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ABSTRACT

Medical facility purchasing is a field for which there is little historical background of curriculum development. To determine the content of an educational curriculum in the field, data on the frequency, supervision, and difficulty of performance in 208 task elements were obtained from a survey of 131 individuals in 29 institutions. In addition a questionnaire concerning general purchasing practices was mailed to the administrators of the institutions. Some findings and recommendations were: (1) Most hospitals have some kind of central purchasing facility, and both centralized and decentralized purchasing commonly exist at the same institution, (2) Purchasing functions are generally performed with little or no supervision and do not involve high levels of difficulty, (3) Nearly every purchasing function is performed at some time by persons other than purchasing agents, (4) Since diversity of policies and procedures exist, flexible curriculums should be constructed, and (5) Instructional units should be designed to combine tasks related to a common function. Background information for the project may be found in ED 037 570 and other allied health projects are available as VT 011 426-VT 011 432 in this issue. (SB)

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Interim Report

A STUDY OF PURCHASING OCCUPATIONS IN HEALTH CARE FACILITIES

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UNIVERSITY OF CALIFORNIA, LOS ANGELES
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Research and Development Project for Curricula
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FOREWORD

The Division of Vocational Education, University of California, is an administrative unit of the University concerned with responsibilities for research, teacher education, and public service in the broad area of vocational and technical education. During 1968 the Division entered into an agreement with the U.S. Office of Education to prepare curricula and instructional materials for a variety of allied health areas. For the most part such materials are related to pre-service and in-service instruction in programs from on-the-job instruction through Associate degree programs.

This interim report is a summary of the functional analysis for the occupational area of Health Care Facility Purchasing. A National Technical Advisory Committee for Purchasing provided assistance in designing a questionnaire to identify by job titles the various persons currently performing purchasing functions in the health care facility, and to validate a task list appropriate to personnel in the Purchasing occupations in health care facilities throughout the nation.

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S U M M A R Y

Objectives

1. To determine what needs exist for the training of personnel in purchasing for Health Care Facilities.

2. To develop an educational and training program to meet these needs.

Procedure

1. A survey was undertaken at 29 institutions and data obtained on frequency, supervision, and difficulty of performance in 208 task elements.

2. A questionnaire was mailed to the administrators of these institutions to obtain further information on general purchasing practices.

3. Analysis was made of the findings of survey and questionnaire.

Findings and Recommendations

1. Most hospitals have some kind of central purchasing facility, and commonly both centralized and decentralized purchasing exist at the same institution.

2. Purchasing functions are generally performed with little or no supervision and involve no high levels of difficulty.

3. Nearly every function in the field of purchasing is performed at some time by persons other than purchasing agents.

4. Such diversity of policies and procedures exists that it seems desirable to construct curricula providing flexibility to meet the varying needs of individual health care facilities.

5. Instructional units should be designed to cover a circumscribed area of tasks relating to a common function. Combinations of such units could form general courses of instruction in educational institutions for purchasing personnel, or could be utilized individually by specific health care facilities for pre-service or in-service training programs for administrators, department heads, and other personnel.

Interim Report

A STUDY OF PURCHASING OCCUPATIONS IN HEALTH CARE FACILITIES

I. INTRODUCTION

The fundamental objectives of the Allied Health Profession Projects are to develop curricula and instructional materials for those allied health functions that can be taught to the Associate degree level, and to develop in-service and pre-service instructional programs for those health-related occupations for which on-the-job training may be appropriate. The initial steps leading to the development of curricula involve the identification and listing of all possible tasks in a specified functional area, and verification of their performance by personnel in the occupational categories under consideration. The present report deals with the results of a survey of task performance in the field of purchasing, one of several facility support services for which the development of curricula is envisioned.

Medical Facility Purchasing is a field for which there is little historical background of curriculum development.[1] The purchasing practices of many hospitals and Extended Care Facilities are thought, however, to be a contributing factor to the current high costs of medical care. The present survey was conducted to determine the content of an educational curriculum for personnel operationally responsible for purchasing in health care facilities. It was necessary to determine (a) whether there are specific personnel at a substantial number of health care institutions who are concerned primarily with purchasing activities, and (b) whether occupational categories are differentiated by performance of different purchasing functions. Non-purchasing-department personnel have been included in the survey in order to determine whether the kinds of functions performed by such personnel would suggest a need for curricula designed for individuals who perform some purchasing functions as an adjunct to their primary duties.

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[1]The only formal instructional program located by the Project during a search of the literature was "The Catholic Hospital Association Hospital Purchasing Administration Correspondence Course", 1962, prepared by the University of Chicago Home-Study Department for use by the Catholic Hospital Association, St. Louis, Missouri.

II. PROCEDURE

A. Survey Instruments

Data on institutional practices in the field of purchasing were collected by means of a survey form listing those specific tasks which might be performed by individuals who participate in purchasing functions. A tentative list of tasks was constructed after a survey of pertinent literature (the principal sources consulted are listed in Appendix A). This list was reviewed by the National Technical Advisory Committee for Purchasing (membership is listed in Appendix B) at its May 1969 meeting.[2] Revisions and additions were made by the Committee, and the list as approved for the survey consisted of 208 tasks grouped under fourteen major sub-headings defining broad areas of activity. The survey form (Appendix C-4) provided for responses on three dimensions of performance for each task: frequency (how often do you do this task?), supervision (how much supervision do you get for this task?), and difficulty (how difficult is this task?). Ordinal scales, each of five steps, were provided for responses on these dimensions, the steps being defined in the instructions to respondents (Appendix C-2) and on the survey form.

The survey was administered by resident administrators in six metropolitan areas. An attempt was made to select respondents who accomplished at least some of the functions covered by the survey, as outlined in the instructions to the survey administrators (Appendix C-1). Hospital administrators were consulted to determine which departments might provide respondents, and the selection of the specific respondents within a department usually was made by the department head. Since the apportionment of responsibilities for various functions among different personnel varied from one institution to another, all institutions were not equally represented in the total respondent sample. At seven of the responding institutions there was more than one respondent from the purchasing department; at the others there was only one, usually either a purchasing agent or a storekeeper. The number of department head respondents varied from none at eight institutions to five at one institution, and the number of supervisor respondents from none at eight institutions to seven at one institution.

At the time the survey was administered, each respondent also completed a background information inventory (Appendix C-3) covering education and

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[2] Robert R. Henrich (Mary Ellison, Ed.) Meeting Report, National Technical Advisory Committee for Purchasing, Los Angeles, California May 26-27, 1969. U.S.O.E. Research and Demonstration Grant 8-0627, Allied Health Professions Projects, Division of Vocational Education, University of California, Los Angeles, 1969.

TABLE 1

PERCENTAGES OF RESPONDENTS FROM
FOUR TYPES OF INSTITUTIONS

Respondents by Occupational Category	Number of Resp's	Percent			
		Large Hospital	Medium Hospital	Small Hospital	ECF
Purchasing Department					
Purchasing Agents	13	54	23	23	0
Assistant P. A.	7	43	57	0	0
Storekeepers	10	50	40	10	0
Administrators	8	0	25	37	37
Accountants	4	50	25	25	0
Department Heads					
Pharmacy	8	50	37	13	0
Dietary	10	50	40	0	10
Housekeeping	12	33	42	25	0
Nursing	3	33	67	0	0
Other	8	50	25	25	0
Supervisors					
Dietary	14	7	43	36	14
Housekeeping	9	11	78	0	11
Nursing	11	45	36	18	0
Other	3	0	67	0	33
Workers	6	50	33	17	0
Total	126	36	40	17	7

previous experience. Additional data concerning the general purchasing procedures at the responding institutions were collected by means of a questionaire (Appendix D) mailed to hospital administrators after the survey had been completed.

B. Respondent Sample

Responses to the purchasing survey were obtained from 131 individuals at 29 institutions[2], of which 9 were large hospitals (200 or more beds), 9 were medium-sized hospitals (100-199 beds), 7 were small hospitals (less than 100 beds), and 4 were Extended Care Facilities. The number of respondents varied from one institution to another; at some institutions there were only one or two respondents. The occupational categories represented in the respondent sample were purchasing agent, assistant purchasing agent, storekeeper or storeroom manager, administrator, accountant or controller, department head, first-line supervisor and non-supervisory worker (e.g., ward clerk, food steward).

A receiving clerk, an invoice clerk, an accounting clerk, and two purchasing department secretaries did not fit into any of these categories. At an early stage of data analysis it became evident that there were substantial individual differences in patterns of task performance by personnel within each of the eight specified occupational categories. It therefore seemed better to exclude the data obtained from the clerks than to present descriptions based upon single individuals whose patterns of task performance might not be generally representative of their occupational categories. The data obtained from the secretaries also were excluded because, while each performed some tasks in some of the areas that were surveyed, there was not a single task in the whole list that was performed by both secretaries. The respondent sample accordingly was reduced to 126 cases.

The percentage distributions of respondents among different types of institutions are shown in Table 1, page 5. The majority of respondents in most occupational categories were from large or medium-sized hospitals. There were relatively few from small hospitals, and very few from Extended Care Facilities (ECF). The majority of administrators, however, were from small hospitals or Extended Care Facilities. The largest numbers of respondents were in the categories of department head and supervisor; only 23 of the respondents were purchasing-department personnel. Most using-department personnel were in pharmacy, dietary, housekeeping, or nursing departments; a few were in miscellaneous other departments.

Table 2, page 7, shows the educational backgrounds of the respondents in each occupational category. Purchasing agent is not a clearly defined profession for which any specific standards or qualifications exist, and none of the purchasing department personnel had received any kind of certification. The majority of purchasing agents, assistant purchasing agents and storekeepers had at least some college education, but relatively few purchasing agents had received any further specific training for their jobs. Only two of the thirteen purchasing agents had previous experience in hospital

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[2]Designated by asterisk in Appendix G listing the 48 institutions in the Selected National Sample of Health Care Facilities.

TABLE 2

PERCENTAGE DISTRIBUTIONS OF RESPONDENTS
ACCORDING TO EDUCATION AND CERTIFICATION

Respondents by Occupational Category	(N)	Percent							
		Academic Education			Further Training			Certification	
		Grade School	High School	Some College	None	On-Job	Other		
Purchasing Department									
Purchasing Agents	13	15	23	62	69	15	15	0	
Assistant P. A.	7	0	43	57	29	29	43	0	
Storekeepers	10	0	40	60	30	70	0	0	
Administrators	8	0	13	87	75	0	25	0	
Accountants	4	0	25	75	50	50	0	25	C.P.A.
Department Heads									
Pharmacy	8	0	0	100	62	0	38	62	R.Ph.
Dietary	10	20	0	80	40	30	30	70	R.D.
Housekeeping	12	17	58	25	17	42	42	42	C.E.H.
Nursing	3	0	33	67	0	0	100	100	R.N.
Other	8	0	25	75	50	13	37	62	Various
Supervisors									
Dietary	14	21	21	57	0	57	43	21	R.D.
Housekeeping	9	56	22	22	22	67	11	11	L.P.N.
Nursing	11	9	45	45	9	0	91	91	R.N.
Other	3	33	67	0	33	67	0	0	
Workers	6	17	33	50	17	66	17	0	

purchasing departments, but seven others had previous experience either in purchasing in other contexts or in the management of retail businesses where some experience in purchasing might be obtained. The seven assistant purchasing agents, on the other hand, all had some previous experience in hospital purchasing departments in lower level positions, such as storeroom manager or supply superintendent.

Some differences among departments in the kind of education and training received by department heads and supervisors can be seen in Table 2. Housekeeping department personnel tended to have less academic education than personnel within other departments. The majority of department heads in most departments had received certification appropriate to their fields, but certified executive housekeepers (C.E.H.) were a minority among housekeeping department heads.

C. Data Analysis

Assistance in the processing and reduction of survey and background information data and in computer analysis of these data was provided by the Survey Research Center of the University of California, Los Angeles. Frequency distributions were obtained for frequency, supervision and difficulty responses to all tasks listed on the survey for each of the eight occupational groups specified previously. The mean and mode were calculated for each distribution in terms of the numerical scale values.

The most important aspect of performance was considered to be whether or not a task was performed at all, either frequently or infrequently, by respondents in particular occupational categories. The mode was used in preference to the mean as an indicator of frequency of performance because in many instances it was found that the shape of a distribution was such that its mean actually would not be representative of any respondents.

Task supervision data are not included in the present report because the results of their analysis indicated that there were no important differences either between tasks or between occupational categories with respect to whether or not performance usually was supervised. Most of the tasks were performed occasionally or rarely under supervision by a few respondents, but not one was performed all or most of the time under supervision by as many as half of the respondents in any occupational category who performed it.

The results of the analysis are described in the present report in terms of three task parameters:

a. percentage of respondents who perform the task.

b. modal frequency of performance by respondents who perform the task.

c. mean of the difficulty ratings of the task by respondents.

III. RESULTS

A. Centralization of Purchasing

Preliminary analyses of the survey data showed that in most areas of activity related to purchasing there were no clear divisions of responsibility for task performance among the different occupational categories. The great majority of tasks were performed by at least some personnel in each occupational category, and not performed by at least some other personnel in each occupational category. While there were some areas in which tasks appeared to be more consistently performed by personnel in certain occupational categories and not performed by personnel in other occupational categories, in many areas the extent of overlap with respect to performance by personnel in different occupational categories was considerable.

It was thought that one reason for this situation might be the existence of variations among institutions in the degree of centralization of purchasing functions. An attempt therefore was made to determine what the degree of centralization of purchasing was at each of the responding institutions and how this factor affected task performance by respondents in different occupational categories. The data obtained from the questionnaires sent to administrators were employed in conjunction with the survey data for this purpose; for the six institutions from which questionnaire data were not obtained, the extent of centralization of purchasing was inferred by examination of the patterns of task performance by the individual respondents at those institutions.

It was evident that the institutions could not be characterized simply as having either centralized or decentralized purchasing. Almost all of the hospitals have some kind of central purchasing department, and only four hospital administrators, in their responses to the questionnaire, described their purchasing structures as decentralized rather than centralized. In many of the hospitals, however, patterns of task performance by non-purchasing department personnel suggest that purchasing is far from being completely centralized.

Table 3, page 10, shows the types of purchasing structures found in the responding institutions. Only one small hospital did not have a purchasing department or agent. None of the four Extended Care Facilities have purchasing departments or agents, but at two of them at least some purchasing is done centrally by the administrator. Hospital size does not seem to be related to the degree of centralization of purchasing, but there is a tendency for larger hospitals to have a purchasing staff while small hospitals have only a purchasing agent who works without assistance. At a few institutions the storekeeper or storeroom manager acts as a purchasing agent.

Table 4, page 11, shows the percentages of department head and supervisor respondents from institutions at which purchasing for their departments is centralized or decentralized. Of the total number of using department

TABLE 3

PERCENTAGE DISTRIBUTIONS OF TYPES OF PURCHASING STRUCTURES IN DIFFERENT TYPES OF INSTITUTIONS

Institution Type	(N)	Percent				
		1	2	3	4	5
Large	9	56	22	0	11	0
Medium	9	44	11	33	11	0
Small	7	14	57	14	0	14
ECF	4	0	0	0	0	100

1. Purchasing department consists of a purchasing agent and one or more additional staff members.

2. Purchasing department consists of a purchasing agent only.

3. Purchasing is done by the storekeeper.

4. Purchasing department is a department of a larger administrative unit of which the institution is a part.

5. Purchasing is done by administrators and/or using departments; the institution does not have a purchasing department.

TABLE 4

PERCENTAGES OF USING-DEPARTMENT HEADS AND SUPERVISORS IN DEPARTMENTS FOR WHICH PURCHASING IS CENTRALIZED OR DECENTRALIZED

Respondents by Occupational Category	(N)	Percent		
		Purchasing Centralized	Partly Decentralized	Mainly Decentralized
Department heads				
Pharmacy	8	0	13	87
Dietary	10	10	20	70
Housekeeping	12	75	25	0
Nursing	3	100	0	0
Other	8	62	25	13
Supervisors				
Dietary	14	7	14	79
Housekeeping	9	78	0	22
Nursing	11	100	0	0
Other	3	67	0	33

respondents, 39% of the department heads and 38% of the supervisors are in departments for which purchasing is done mainly by the department head. Although none of the administrators indicated on the questionnaire that purchasing at their institutions was done by personnel below the level of department head, at least a few supervisors at some institutions do engage in purchasing activities, as indicated by their responses to the survey. The differences between departments which may be seen in Table 4 indicate that at most institutions it is usual that purchasing for pharmacy and dietary departments be done by the heads of those departments, and that purchasing for other departments be done by the purchasing department.

Since it seemed that the preparation and/or review of purchase orders might serve as an approximate indicator of the extent to which individuals, particularly those in using departments, participate in purchasing functions, a tabulation was made of the percentages of respondents in each occupational category who perform this task. The results are shown in Table 5, page 13. As would be expected, most purchasing agents and assistant purchasing agents prepare and sign purchase orders. Some storekeeper respondents also perform these duties. At two of the responding institutions, the administrators indicated on the questionnaire that some purchasing was done by the storekeepers, and at two others the administrators indicated that the storekeepers were the principal persons responsible for purchasing. It was found by examination of the individual survey forms that the 40% figure in Table 5, for storekeepers who review and sign purchase orders, represents the respondents from those four institutions.

Administrators and accountants usually do not prepare or sign purchase orders. While a few administrators, particularly those at Extended Care Facilities, do participate to some extent in purchasing, apparently purchase orders usually are prepared by using-department personnel at those institutions which do not have purchasing departments. It can be seen from Table 5 that many pharmacy and dietary department heads, but relatively few other using-department personnel, deal with purchase orders at institutions which have purchasing departments. Purchase orders are signed by 22% of all department head respondents and 19% of all supervisor respondents; an additional 15% of department heads and 11% of supervisors prepare but do not sign purchase orders. Where using-department personnel have the authority to sign purchase orders, it might be inferred that they have a major degree of responsibility for purchasing. About 20% of the using-department respondents therefore might be expected to perform most of the same functions that are performed by purchasing agents. The expected upper limit for the number performing most functions would be about 40%, representing the proportion who are in departments for which purchasing is mainly decentralized.

Functions such as storeroom management, receiving, inventory control, and accounting may be either centralized or decentralized in particular institutions and for particular departments within institutions. At some institutions the purchasing agent may himself perform some or all of these functions; at other institutions, he may have some general supervisory responsibilities in the areas but may not be directly involved in performing the activities in the areas. Some using departments may have their own storeroom facilities or may do some or most of their own receiving or accounting. For other using

TABLE 5

PERCENTAGES OF RESPONDENTS WHO REVIEW AND SIGN (22) OR PREPARE (21.2) PURCHASE ORDERS*

Respondents by Occupational Category	(N)	Percent		
		Review and Sign	Prepare Only	Neither
Purchasing Department				
Purchasing Agents	13	77	15	8
Assistant P. A.	7	71	29	0
Storekeepers	10	40	0	60
Administrators	8	13	0	87
Accountants	4	25	0	75
Department Heads				
Pharmacy	8	50	25	25
Dietary	10	40	10	50
Housekeeping	12	8	8	84
Nursing	3	0	0	100
Other	8	0	25	75
Supervisors				
Dietary	14	21	14	65
Housekeeping	9	22	0	78
Nursing	11	9	9	82
Other	3	33	33	33
Workers	6	17	0	83

*Numbers refer to specific tasks listed in Appendix C-4.

TABLE 6.1

Area I-A. IDENTIFY NEEDS FOR SUPPLIES, SERVICES AND EQUIPMENT (1-3)*

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	50	Daily Several times a week	Minor decisions Select suitable procedure
Assistant P.A.	0		
Storekeepers	30	Daily Several times a week	Minor decisions Select suitable procedure
Administrators	80	Several times a year	Minor decisions
Accountants	50	Several times a year	Select suitable procedure
Dept. Heads	80	Several times a week Several times a month	Select suitable procedure
Supervisors	60	Several times a week Several times a month	Minor decisions Select suitable procedure
Workers	0		

* On the survey form, sections I and II were designated "to be completed by the using department" and section III "to be completed by the using department and/or administration." Some of the respondents in other categories nevertheless completed these sections of the survey and indicated that they performed the tasks in these areas, but only one assistant purchasing agent did so. It is possible, therefore, that some assistant purchasing agents do in fact perform these tasks but that they interpreted the instructions to mean that they should not complete these sections of the survey form.

departments some or all of these functions may be done by the purchasing department, whether or not other functions related to purchasing are performed by using-department personnel.

At present most purchasing for departments other than pharmacy and dietary is handled by purchasing departments, and the questionnaire responses of the administrators indicate that in the future a tendency toward further centralization of purchasing can be expected in hospitals, although not in Extended Care Facilities. Fourteen of the twenty-three administrators who replied to the questionnaire stated that they would like to have a greater degree of centralization of purchasing at their institutions; only five, of whom four were Extended Care Facility administrators, did not think that centralized purchasing was desirable for their institutions. The existence of centralized purchasing facilities at nearly all hospitals and the suggested trend toward increased centralization indicate a need for individuals trained in this field.

B. Task Performance by Occupational Categories

The principal findings of the survey are presented in this section in terms of task performance in 26 areas of activity by personnel within eight occupational categories. The tasks listed on the survey form were grouped into fourteen principal areas designated by Roman numerals I to XIV. These designations have been employed here with letters suffixed to indicate sub-divisions of the original areas made for the purposes of the present analysis (e.g., I-A).

Data on the performance of the specific tasks within each area are shown in Appendix F. The entries in Tables 6.1 to 6.26 are abstractions from Appendix F and are intended to provide a summary description of performance of the overall function represented in each area. Each table shows (a) the approximate percentage (in steps of 10%) of personnel who perform at least some of the tasks in the area and who therefore may be considered to participate in performance of the overall function, (b) the modal frequency of performance of the function (or frequencies if a single mode represents less than half of those who perform the function, and (c) the general level or levels of difficulty of the tasks in the area.

The parenthesized numbers in the tables and text refer to the specific tasks which are listed in Appendix C-4 in numerical order and listed in Appendix F in the order considered appropriate for different occupational categories.

1. Area I-A, Identify Needs For Supplies, Services and Equipment (1-3)

Purchasing agents perform the tasks in this area with relatively high frequencies; they may participate daily in budget preparation (1) and identification of needs (2).
Assistant purchasing agents did not respond to this section of the survey, but their task performance may be similar to that of purchasing agents (cf. footnote to Table 6.1, page 14).
Storekeepers at some institutions participate frequently in budget preparation (1) and in identifying types of supplies and services needed (2), and occasionally in establishing quality and quantity standards (3).
Administrators perform the tasks in this area, but usually do so infrequently.

TABLE 6.2

Area I-B. DETERMINE STORAGE LOCATIONS AND MAINTAIN STOCK LEVELS (4-6)*

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	50	Daily Several times a week	Minor decisions
Assistant P.A.	0		
Storekeepers	40	Daily	Minor decisions Select suitable procedure
Administrators	60	Several times a year	Minor decisions Select suitable procedure
Accountants	50	Several times a month	Select suitable procedure
Dept. Heads	80	Daily Several times a week	Minor decisions
Supervisors	70	Several times a week Several times a month	Minor decisions
Workers	0		

* On the survey form, sections I and II were designated "to be completed by the using department" and section III "to be completed by the using department and/or administration." Some of the respondents in other categories nevertheless completed these sections of the survey and indicated that they performed the tasks in these areas, but only one assistant purchasing agent did so. It is possible, therefore, that some assistant purchasing agents do in fact perform these tasks but that they interpreted the instructions to mean that they should not complete these sections of the survey form.

Accountants at some institutions perform the tasks in this area several times a year.
Department heads at most institutions perform the tasks in this area. Their frequencies of performance vary, as needs might be expected to vary among different departments and different institutions.
Supervisors perform the tasks in this area following a pattern similar to that of department heads.
Workers usually do not perform the tasks in this area, but some may occasionally participate in identifying the type of supplies and services required (3).

Summary

The activities related to planning for the fulfillment of needs are performed by various personnel. In some institutions, and perhaps in most, purchasing agents engage in these activities frequently. Department heads and supervisors perform the tasks in this area, but usually with somewhat lesser frequencies than purchasing agents. The relatively low frequencies of performance by administrators and accountants suggest that these personnel may participate only after preliminary planning has been carried out by purchasing and using-department personnel. Purchasing agents and administrators may not always be concerned with determining quality and quantity standards (3); apparently using-department heads and supervisors often are primarily responsible for this task. Performance of the tasks in this area requires at least minor decisions, and the selection of suitable procedures.

2. Area I-B. Determine Storage Locations and Maintain Stock Levels (4-6)

Purchasing agents perform the tasks in this area with relatively high frequencies, as often as daily. They participate in determining storage location and levels (4), but usually are not concerned with details of storeroom arrangements (4.2).
Assistant purchasing agents did not respond to this section of the survey, but their task performance may be similar to that of purchasing agents (cf. footnote to Table 6.1).
Storekeepers at some institutions perform the tasks in this area daily. They may determine storage locations within the storeroom (4.2), but usually do not participate in determining storage unit locations (4.1).
Administrators at some institutions participate in determining storage locations and levels (4) several times a year, but are not directly concerned with maintenance of stock levels (5-6).
Accountants usually are not concerned with storage locations and stock levels (4-5), but at some institutions they process orders to fill unanticipated needs (6) several times a month.
Department heads at most institutions perform the tasks in this area. Frequencies of performance vary, probably with individual departments and institutions. Some department heads may participate in determining only storage unit locations (4.1), and others in determining only arrangements within the storeroom (4.2).
Supervisors at most institutions perform the tasks in this area following a pattern similar to that of department heads.
Workers usually do not perform the tasks in this area, although a few may occasionally submit requisitions to maintain stock levels (5.).

TABLE 6.3

Area II. PREPARE STANDARD REQUISITION FOR PURCHASING AND/OR STORES (7-8)*

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	40	Daily	Minor decisions
Assistant P.A.	0		
Storekeepers	30	Several times a week	Minor decisions Select suitable procedure
Administrators	0		
Accountants	0		
Department Heads	70	Several times a week Several times a month	Routine procedure Minor decisions
Supervisors	80	Several times a week Several times a month	Minor decisions
Workers	80	Several times a week Several times a month	Minor decisions Select suitable procedure

* On the survey form, sections I and II were designated "to be completed by the using department" and section III "to be completed by the using department and/or administration." Some of the respondents in other categories nevertheless completed these sections of the survey and indicated that they performed the tasks in these areas, but only one assistant purchasing agent did so. It is possible, therefore, that some assistant purchasing agents do in fact perform these tasks but that they interpreted the instructions to mean that they should not complete these sections of the survey form.

Summary

Purchasing agents, administrators, and using-department personnel all may participate in determining storage locations (4-4.2). Purchasing agents are more likely to be concerned only with unit locations (4.1) rather than with locations within the storeroom (4.2); the latter usually are determined by storekeepers or using-department heads and supervisors. Administrators also may participate in these activities, but usually only infrequently. Both purchasing-department and using-department personnel maintain stock levels (5) and fill unanticipated needs (6), but administrators do not perform these tasks. Performance of the tasks in this area generally involves minor decisions.

3. Area II. Prepare Standard Requisition For Purchasing And/Or Stores (7-8)

Purchasing agents perform the tasks in this area with relatively high frequencies, as often as daily.
Assistant purchasing agents did not respond to this section of the survey, but their performance may be similar to that of purchasing agents (cf. footnote to Table 6.1, page 14).
Storekeepers at some institutions perform the tasks in this area, but usually less frequently than purchasing agents do.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads at most institutions perform the tasks in this area. A few department heads prepare requisitions daily, but most do so several times a week or several times a month. Variations in frequencies of performance may be expected, since certain departments may use greater proportions of consumable supplies and, therefore, need to make requisitions more frequently than do other departments. Some department heads may prepare requisitions only for standard expendable supplies, since a number of those who perform the tasks in this area do not enter justifications for items that are not standard expendable supplies (7.6).
Supervisors at most institutions perform the tasks in this area following a pattern similar to that of department heads.
Workers at most institutions perform the tasks in this area, but probably they prepare requisitions only for standard expendable supplies. They usually do not enter justifications for items that are not standard expendable supplies (7.6). This task element is considered by using-department personnel to be slightly more difficult than other elements in the area, and apparently it is performed, when necessary, by department heads or supervisors rather than by lower-level personnel.

Summary

Standard requisitions are prepared frequently by purchasing agents in at least some institutions, and with varying frequencies by storekeepers at some institutions and by department heads, supervisors and workers at most institutions. Some department heads and supervisors apparently are authorized to requisition only standard expendable supplies, and workers usually do not prepare requisitions for items other than standard expendable supplies. Some items (7.1, 7.2) on a requisition form are routine; other items and forwarding of the form to the approving authority (8) may require minor decisions.

TABLE 6.4

Area III. REVIEW REQUISITION AND FORWARD TO PURCHASING OR STORES (9-10.32)*

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performances	Difficulty Level of Tasks
Purchasing Agents	40	Daily	Minor decisions
Assistant P.A.	0		
Storekeepers	20	Several times a week Several times a month	Routine procedure Minor decisions
Administrators	50	Several times a week Several times a month	Minor decisions
Accountants	0		
Department Heads	50	Several times a week Several times a month	Minor decisions
Supervisors	50	Several times a month Several times a year	Minor decisions Select suitable procedure
Workers	30	Several times a week Several times a month	Minor decisions Select suitable procedure

* On the survey form, sections I and II were designated "to be completed by the using department" and section III "to be completed by the using department and/or administration". Some of the respondents in other categories nevertheless completed these sections of the survey and indicated that they performed the tasks in these areas, but only one assistant purchasing agent did so. It is possible, therefore, that some assistant purchasing agents do in fact perform these tasks but that they interpreted the instructions to mean that they should not complete these sections of the survey form.

4. Area III. Review Requisition And Forward To Purchasing Or Stores (9-10.32)

Purchasing agents receive and review requisitions daily. They usually have authority to approve most requisitions received, but must occasionally seek approval of requisitions from higher authority (10.2,10.24,10.25). Purchasing agents check with the requisitioning department to justify requisitions when necessary (10.21), and regularly determine price/cost (10.22).
Assistant purchasing agents did not respond to this section of the survey, but their performance may be similar to that of purchasing agents (cf. footnote to Table 6.1).
Storekeepers at some institutions review and approve requisitions.
Administrators at some institutions review and approve requisitions, usually several times a week or several times a month. At other institutions performance of these tasks apparently is the responsibility of either the purchasing or using departments, but the administrators make determinations of price/cost (10.22) for at least some requisitions.
Accountants do not perform the tasks in this area.
Department heads perform the tasks in this area when purchasing for their departments is at least partly decentralized. Their frequencies of performance tend, on the average, to be lower than the frequencies of performance of the tasks by purchasing agents. About half of the department heads who receive and review requisitions also forward requisitions to superior purchasing authority for approval (10.2).
Supervisors perform the tasks in this area when purchasing for their departments is at least partly decentralized, following a pattern similar to that of department heads.
Workers at some institutions receive requisitions for review, but usually do not check budgetary information on the requisitions (10.11, 10.21-10.23) and may do little more than forward them to higher authority for approval (10.2).

Summary

The initial review and approval of requisitions is carried out frequently by purchasing agents, and somewhat less frequently by administrators and using-department personnel at some institutions. Approximately 40-50% of department heads and supervisors review and approve requisitions(10.13), substantially less than the percentage who prepare requisitions (Area III, Table 6.3). Probably most of these using-department personnel are in pharmacy or dietary departments, for which purchasing in most institutions tends to be mainly decentralized. In other using departments, the responsibilities of personnel in the area of purchasing may not extend beyond the preparation of requisitions which then are forwarded to the purchasing department in some institutions or to the administrator in other institutions for review and approval. Most of the tasks in this area involve minor decisions; forwarding of the requisition to superior authority (10.12),justification of the requisition (10.24), and its consideration for final approval (10.25) may require selection of suitable procedures.

5. Area IV. Edit Requisition And Approve For Purchase (11-15)

Purchasing agents perform the tasks in this area daily. Editing of requisitions for approval authority (12.4) and value analyses of requisitions (14) are done less frequently. All purchasing agents do not number requisitions and assign

TABLE 6.5

Area IV. EDIT REQUISITION AND APPROVE FOR PURCHASE (11-15)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	90	Daily	Minor decisions
Assistant P.A.	100	Daily Several times a week	Minor decisions
Storekeepers	60	Daily	Rountine procedure Minor decisions
Administrators	30	Several times a week Several times a month	Minor decisions
Accountants	0		
Department Heads	30	Several times a week Several times a month	Minor decisions Select suitable procedure
Supervisors	20	Several times a month Several times a year	Minor decisions Select suitable procedure
Workers	0		

them to buyers (13).
Assistant purchasing agents perform the tasks in this area daily or several times a week, following a pattern similar to that of purchasing agents.
Storekeepers at many institutions do some editing of requisitions daily, but usually do not edit for budgetary information (12.1), and do not approve for purchase (15).
Administrators at some institutions approve requisitions (15) several times a week or several times a month, but do not always edit them in detail (12-12.5), and usually do not assign them to buyers (13) or value analyze them (14).
Accountants do not perform these tasks.
Department heads may edit and approve requisitions when purchasing for their departments is decentralized. While they approve requisitions daily or several times a week, they may edit requisitions only several times a month or several times a year.
Supervisors may perform the tasks in this area when purchasing for their departments is decentralized, following a pattern similar to that of department heads.
Workers do not perform the tasks in this area.

Summary

Final editing and approval of requisitions at most institutions usually are the responsibility of the purchasing agents and/or assistant purchasing agents, who perform these tasks daily. At a number of institutions storekeepers edit requisitions, but usually do not approve them for purchase. At some institutions, department heads and supervisors perform these tasks when purchasing for their departments is decentralized, but at other institutions they may carry out only the initial review of requisitions (Area III) and forward them to either the purchasing departments or administrators for final approval. Purchasing-department personnel consider the tasks in this area to require only minor decisions, but using-department personnel consider them to involve selection of suitable procedures.

6. Area V-A. Pre-determine Sources Of Supply (16-16.5)

Purchasing agents pre-determine sources of supply for small orders (16.2)daily, but for emergency purchases (16.3) and immediate needs (16.4) less frequently.
Assistant purchasing agents perform the tasks in this area following a pattern similar to that of purchasing agents.
Storekeepers at some institutions perform the tasks in this area, but usually less frequently than do purchasing agents.
Administrators at some institutions perform the tasks in this area, but usually not more frequently then several times a month.
Accountants do not perform the tasks in this area.
Department heads perform the tasks in this when purchasing for their departments is decentralized, but their frequency of performance tends to be less than that of purchasing agents.
Supervisors at some institutions may occasionally perform the tasks in this area when purchasing for their departments is decentralized, but it appears to be more usual for activities in this area to be the responsibility of department heads.
Workers do not perform the tasks in this area.

TABLE 6.6

Area V-A. DETERMINE SOURCES OF SUPPLY AMONG CURRENT SUPPLIERS (16-16.5)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	90	Daily	Minor decisions Select suitable procedure
Assistant P.A.	100	Daily Several times a week	Minor decisions Select suitable procedure
Storekeepers	60	Daily Several times a week	Minor decisions
Administrators	50	Several times a month Several times a year	Minor decisions
Accountants	0		
Department Heads	40	Several times a month Several times a year	Select suitable procedure
Supervisors	20	Several times a month Several times a year	Minor decisions Select suitable procedure
Workers	0		

TABLE 6.7

Area V-B. EVALUATE PRODUCTS OF POTENTIAL SUPPLIERS AND SELECT QUALIFIED POTENTIAL SUPPLIERS (17-17.6)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	90	Several times a week Several times a month	Minor decisions Select suitable procedure
Assistant P.A.	90	Several times a week Several times a month	Minor decisions Select suitable procedure
Storekeepers	40	Daily Several times a week	Minor decisions Select suitable procedure
Administrators	40	Several times a month Several times a year	Minor decisions
Accountants	0		
Department Heads	40	Several times a month Several times a year	Select suitable procedure
Supervisors	20	Several times a year	Minor decisions Select suitable procedure
Workers	0		

Summary

Purchasing agents and assistant purchasing agents at most institutions frequently pre-determine sources of supply. Storekeepers in some institutions and department heads in departments for which purchasing is decentralized perform these tasks, but usually less frequently. Administrators predetermine sources of supply at some institutions, probably usually at smaller institutions which do not have purchasing departments. Pre-determination of sources for traveling purchasing requisitions (16.5) is done by only a minority of purchasing agents and by very few administrators and using-department personnel. Most tasks in this area are considered by purchasing agents to involve no more than minor decisions, except for vendor selection and product evaluation to meet immediate needs (16.4), which may involve selection of suitable procedures. Department heads, however, consider most of the tasks to involve selection of suitable procedures.

7. Area V-B. Evaluate Products Of Potential Suppliers And Select Qualified Potential Suppliers (17-17.6)

Purchasing agents consider vendors with whom a supplier relationship already exists (17.3) and select qualified suppliers (17.6) with relatively greater frequencies than they consider reference materials (17.1), consult with others, (17.2, 17.4, 17.5) or evaluate products (17.21-17.23).
Assistant purchasing agents perform the tasks in this area following a pattern similar to that of purchasing agents.
Storekeepers at some institutions perform the tasks in this area following a pattern generally similar to that of purchasing agents, except that they usually do not consult with local professional organizations (17.5).
Administrators at some institutions select qualified suppliers (17.6) several times a month or several times a year by considering reference material (17.1) and considering vendors with whom a supplier relationship already exists (17.3), but usually they do not evaluate products (17.21-17.23) or consult with other departments or organizations (17.4, 17.5).
Accountants do not perform the tasks in this area.
Department heads perform the tasks in this area several times a month or several times a year when purchasing for their departments is decentralized.
Supervisors at a few institutions may occasionally perform the tasks in this area when purchasing for their departments is decentralized, but it appears to be more usual for activities in this area to be the responsibility of department heads.
Workers do not perform the tasks in this area.

Summary

Evaluation of products and selection of suppliers is done on the average several times a month by purchasing agents and assistant purchasing agents, and by department heads in departments for which purchasing is decentralized. Storekeepers at some institutions perform these tasks. While administrators at a number of institutions select suppliers, they usually do not evaluate products. Performance requires at least minor decisions, and most of the tasks involve selection of suitable procedures.

TABLE 6.8

Area V-C. EVALUATE CAPABILITIES OF SELECTED POTENTIAL SUPPLIERS (18-18.5)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agent	100	Several times a month Several times a year	Minor decisions Select suitable procedure
Assistant P.A.	90	Several times a year	Minor decisions Select suitable procedure
Storekeepers	20	Several times a year	Routine procedure Minor decisions
Administrators	30	Several times a year	Routine procedure Minor decisions
Accountants	0		
Department Heads	30	Several times a month Several times a year	Minor decisions Select suitable procedure
Supervisors	20	Several times a month Several times a year	Minor decisions Select suitable procedure
Workers	0		

8. Area V-C. Evaluate Capabilities Of Selected Potential Suppliers (18-18.5)

Purchasing agents evaluate at least some aspects of supplier capability, usually several times a month or several times a year; but they do not consistently evaluate all specific aspects, such as technical capability, financial capability, etc. (18.1-18.5).
Assistant purchasing agents perform the tasks in this area, usually several times a month or several times a year. The percentages performing each specific task in the area (cf. Appendix F-1) suggest that assistant purchasing agents may be more consistent than purchasing agents in evaluating all or most specific aspects of capability.
Storekeepers at some institutions occasionally may perform some evaluation of suppliers, but usually they do not make evaluations in terms of specific capabilities.
Administrators at some institutions may evaluate suppliers several times a year, but do not consistently make evaluations in terms of specific capabilities.
Accountants do not perform the tasks in this area.
Department heads evaluate suppliers, usually several times a month or several times a year, when purchasing for their departments is decentralized, but they do not consistently evaluate all specific aspects of capability.
Supervisors at some institutions perform the tasks in this area several times a month or several times a year when purchasing for their departments is decentralized; at other institutions responsibility for evaluation of suppliers may not extend below the level of department head.
Workers do not perform the tasks in this area.

Summary

Evaluation of suppliers mainly is done by purchasing agents and assistant purchasing agents, but not at frequent intervals. Department heads in departments for which purchasing is decentralized, and administrators at some institutions, perform some kinds of evaluations, but do not consistently evaluate all aspects of supplier capability. The tasks in this area generally involve selection of suitable procedures.

9. Area V-D. Obtain Buying Information From Potential Suppliers (19-19.3)

Purchasing agents perform the tasks in this area at least several times a year, and at some institutions more frequently. A large majority make use of both published price lists (19.1) and competitive bidding (19.2), and most negotiate prices (19.3) several times a year when the former procedures are impractical. Most also employ set criteria for use of competitive bidding (19.21-19.24).
Assistant purchasing agents perform the tasks in this area several times a month or several times a year, following a pattern similar to that of purchasing agents.
Storekeepers at some institutions perform the tasks in this area, but they make use more frequently of published price lists (19.1) than of competitive bids (19.2) or negotiation (19.3).
Administrators at some institutions perform the tasks in this area several times a year, but relatively few consistently employ set criteria for the use of competitive bidding (19.21-19.24).

TABLE 6.9

Area V-D. OBTAIN BUYING INFORMATION FROM POTENTIAL SUPPLIERS (19-19.3)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Level of Tasks
Purchasing Agents	100	Several times a month Several times a year	Minor decisions Select suitable procedure
Assistant P.A.	90	Several times a month Several times a year	Minor decisions Select suitable procedure
Storekeepers	20	Several times a month Several times a year	Minor decisions
Administrators	30	Several times a month Several times a year	Minor decisions
Accountants	0		
Department Heads	40	Several times a year	Minor decisions Select suitable procedure
Supervisors	30	Several times a year	Minor decisions Select suitable procedure
Workers	0		

Accountants do not perform the tasks in this area.
Department heads perform the tasks in this area several times a year when purchasing for their departments is decentralized. Their pattern of task performance is more or less similar to that of purchasing agents.
Supervisors obtain buying information from published price lists (19.1) when purchasing for their departments is decentralized, but most do not use competitive bids (19.2) or negotiate prices (19.3).
Workers do not perform the tasks in this area.

Summary

Buying information is obtained by purchasing agents and assistant purchasing agents at relatively infrequent intervals. Storekeepers at some institutions obtain information from published price lists, but usually do not obtain bids or engage in price negotiations. Administrators at some institutions and department heads in departments for which purchasing is decentralized perform the tasks in this area at relatively infrequent intervals. Some supervisors obtain price information from published price lists, but when bids or negotiations are employed by using departments they usually are the responsibility of department heads rather than supervisors. The tasks in this area are considered by purchasing agents and administrators to involve minor decisions, but department heads tend to consider them as having a slightly higher level of difficulty.

10. Area V-E. Complete Requisition (20-20.7)

Purchasing agents perform the tasks in this area daily, with the exceptions of modifying the quantity of items ordered (20.3) and entering special specifications (20.6), which would not have to be done on all requisitions.
Assistant purchasing agents perform the tasks in this area daily, following a pattern similar to that of purchasing agents.
Storekeepers at some institutions perform the tasks in this area daily or several times a week, following a pattern similar to that of purchasing agents.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads at some institutions perform the tasks in this area with varying frequencies when purchasing for their departments is decentralized. Relatively few, however, enter price and shipment specifications (20.5) or any special specifications (20.6) on the requisitions which they complete. Relatively few department heads forward the requisitions to the purchase order preparation desk (20.7), which suggests that most of the department heads who complete requisitions are ones who themselves prepare purchase orders.
Supervisors at some institutions perform the tasks in this area with varying frequencies, following a pattern similar to that of department heads, when purchasing for their departments is decentralized.
Workers do not perform the tasks in this area.

Summary

Completion of requisitions is done mainly by purchasing agents and assistant purchasing agents, who perform the activities daily in most institutions.

TABLE 6.10

Area V-E. COMPLETE REQUISITION (20-20.7)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Level of Tasks
Purchasing Agents	80	Daily	Routine procedure Minor decisions
Assistant P.A.	90	Daily Several times a week	Routine procedure Minor decisions
Storekeepers	30	Daily	Routine procedure Minor decisions
Administrators	0		
Accountants	0		
Department Heads	20	Daily Several times a week	Minor decisions
Supervisors	20	Several times a week Several times a month	Minor decisions Select suitable procedure
Workers	0		

At some institutions requisitions are completed by storekeepers. Department heads and supervisors may complete requisitions with varying frequencies when purchasing for their departments is decentralized, but perhaps only when it is decentralized to such an extent that purchase orders are prepared by using-department personnel. At some institutions purchasing may be partly decentralized for particular departments, but completion of requisitions and preparation of purchase orders still may be done by the purchasing departments. The tasks in this area generally are considered by purchasing agents either to be routine or to involve minor decisions. Using-department personnel, however, consider all the tasks to involve at least minor decisions.

11. Area VI. Prepare Purchase Order (21-23)

Purchasing agents perform the tasks in this area daily, although there are a few items (21.22, 21.24, 21.28, 21.29) which some agents do not enter on the order forms. The majority of purchasing agents do not return the requisition to the buyer when the information on it is insufficient (21.1), and those who do so usually do this no more frequently than several times a month. Possibly in most purchasing departments any insufficiencies in the requisitions are resolved before the stage of preparation of purchase orders is reached.
Assistant purchasing agents perform the tasks in this area daily, following a pattern that is similar to that of purchasing agents, except that relatively more assistant purchasing agents enter the expected date of delivery (21.24) and conditions or terms of purchase (21.29).
Storekeepers at most institutions check requisitions for sufficiency of information (21) daily, and may return requisitions to the buyers when the information is insufficient (21.1). They complete the preparation of purchase orders (21.2-23), however, only at some of these institutions.
Administrators at some institutions occasionally may check requisitions for sufficiency of information (21), but they do not perform the other tasks in the area of purchase order preparation.
Accountants do not perform the tasks in this area.
Department heads at some institutions perform the tasks in this area with varying frequencies when purchasing for their departments is decentralized; their task performance follows a pattern similar to that of purchasing agents.
Supervisors at some institutions perform the tasks in this area with varying frequencies when purchasing for their departments is decentralized; their task performance follows a pattern similar to that of purchasing agents.
Workers do not perform the tasks in this area.

Summary

Preparation of purchase orders is done mainly by purchasing agents and assistant purchasing agents, usually daily. At some institutions storekeepers prepare purchase orders daily. Purchase orders also are prepared, but not always as frequently as daily, by department heads and supervisors in departments for which purchasing is decentralized. Most commonly these are pharmacy and dietary departments (cf. Table 5, page 13), although personnel in these departments do not prepare purchase orders at all institutions. Purchasing-department personnel consider the tasks either to be routine or to involve no more than minor decisions. Using-department personnel consider them to be somewhat more difficult, supervisors in particular judging many of the task elements to require selection of suitable procedures.

TABLE 6.11

Area VI. PREPARE PURCHASE ORDER (21-23)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Level of Tasks
Purchasing Agents	80	Daily	Routine procedure Minor decisions
Assistant P.A.	90	Daily	Routine procedure Minor decisions
Storekeepers	40	Daily	Routine procedure Minor decisions
Administrators	0		
Accountants	0		
Department Heads	30	Daily Several times a week	Minor decisions
Supervisors	30	Several times a week Several times a month	Minor decisions Select suitable procedure
Workers	0		

12. Area VII. Check and Expedite Open Purchase Orders (24-26)

Purchasing agents check and expedite open purchase orders (24) usually daily or several times a week and check with the using department to determine the criticality of the shipments (25) when necessary. Most purchasing agents take appropriate measures to expedite delayed shipments (26) daily or several times a week.
Assistant purchasing agents perform the tasks in this area following a pattern similar to that of purchasing agents.
Storekeepers at some institutions perform the tasks in this but usually less frequently than purchasing agents do.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads at some institutions perform the tasks in this area, usually several times a week or several times a month, when purchasing for their departments is decentralized.
Supervisors at some institutions perform several times a year when purchasing for their departments is decentralized. All do not, however, take appropriate measures to expedite delayed shipments (26); probably a department head more often takes responsibility for this task when it becomes necessary.
Workers do not perform the tasks in this area.

Summary

Purchasing agents and assistant purchasing agents frequently follow up and expedite open purchase orders; they consider the tasks to be either routine or to involve no more than minor decisions. Storekeepers at some institutions and using-department heads and supervisors in some departments for which purchasing is decentralized perform these tasks, but usually less frequently than purchasing agents. Using-department personnel consider that the tasks involve at least minor decisions and may require selection of suitable procedures.

13. Area VIII-A. Receive And File Receiving Copies Of Purchase Orders (27-27.1)

Purchasing agents at most institutions perform the tasks in this area daily; at some institutions receiving is done by a separate receiving department, in which case the purchasing agent does not perform these tasks.
Assistant purchasing agents at some institutions receive copies of purchase orders (27) with varying frequencies, but most do not file them by name of vendor and order number (27.1).
Storekeepers perform the tasks in this area daily.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads at some institutions receive purchase orders (27) daily or several times a week when receiving for departments is decentralized. Most of those who receive purchase orders, however, do not file them by name of vendor and order number (27.1).
Supervisors at some institutions receive purchase orders (27) with varying frequencies when receiving for their departments is decentralized, but all of those who receive purchase orders do not file them by name of vendor and order number. (27.1)

TABLE 6.12

Area VII. CHECK AND EXPEDITE OPEN PURCHASE ORDERS (24-26)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Level of Tasks
Purchasing Agents	90	Daily Several times a week	Routine procedure Minor decisions
Assistant P.A.	90	Daily Several times a week	Minor decisions
Storekeepers	50	Daily Several times a week	Minor decisions
Administrators	0		
Accountants	0		
Department Heads	30	Several times a month	Minor decisions Select suitable procedure
Supervisors	20	Several times a month Several times a year	Minor decisions
Workers	0		

TABLE 6.13

Area VIII-A RECEIVE AND FILE RECEIVING COPIES OF PURCHASE ORDERS (27-27.1)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	70	Daily	Routine procedure Minor decisions
Assistant P.A.	40	Several times a week Several times a month	Routine procedure
Storekeepers	80	Daily	Routine procedure Minor decisions
Administrators	0		
Accountants	0		
Department Heads	30	Daily Several times a week	Minor decisions
Supervisors	20	Several times a week Several times a month	Minor decisions
Workers	30	Daily Several times a week	Minor decisions

TABLE 6.14

Area VIII-B RECEIVE MATERIALS DELIVERED BY VENDORS (28-29.5)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Level of Tasks
Purchasing Agents	60	Daily	Routine procedure Minor decisions
Assistant P.A.	30	Several times a week Several times a month	Routine procedure
Storekeepers	80	Daily	Routine procedure Minor decisions
Administrators	0		
Accountants	0		
Department Heads	20	Several times a week Several times a month	Routine procedure Minor decisions
Supervisors	20	Several times a week Several times a month	Minor decisions
Workers	0		

Workers at some institutions may perform the tasks in this area with varying frequencies when receiving for their departments is decentralized.

Summary

Receiving copies of purchase orders are received and filed daily by storekeepers at most institutions, and by purchasing agents at institutions where receiving is centralized as a function of the purchasing department. These tasks are performed with somewhat lower frequencies by using-department personnel when receiving for their departments is decentralized. Purchasing department personnel consider the tasks in this area to be routine; using-department personnel consider them to involve minor decisions.

14. Area VIII-B. Receive Materials Delivered By Vendors (28-29.5)

Purchasing agents at many institutions perform most of the tasks in this area daily; but at institutions where receiving is done by a separate receiving department, the purchasing agents do not perform these tasks. About half of those who perform the activities in this area participate in the work of unloading containers from the carrier's vehicle (29.2).
Assistant purchasing agents at some institutions perform the tasks in this area usually only several times a week or several times a month.
Storekeepers perform the tasks in this area daily.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads at some institutions perform the tasks in this area several times a week or several times a month when receiving for their departments is decentralized. Relatively few department heads compare the receiving copy of the purchase order with the carrier's manifest (29.1); and relatively few participate in unloading of containers from the carrier's vehicle (29.2).
Supervisors at some institutions perform the tasks in this area several times a week or several times a month when receiving for their departments is decentralized. They compare the receiving copy of the purchase order with the carrier's manifest (29.1), but most do not participate in unloading of containers from the carrier's vehicle (29.2).
Workers do not perform the tasks in this area.

Summary

Shipments are received and checked daily by storekeepers at most institutions and by purchasing agents at institutions where receiving is centralized as a function of the purchasing department. These tasks are performed with varying frequencies by using-department heads and supervisors when receiving for their departments is decentralized. Storekeepers usually participate in the unloading of containers (29.2); other personnel usually do not. Most of the tasks in this area are routine, and none require anything more than minor decisions.

15. Area VIII-C. Inspect Materials Delivered By Vendors (30-31)

Purchasing agents perform the tasks in this area daily at institutions where they are not done by a separate receiving department. They process claims (30.31) several times a year, and may, when necessary, request assistance

TABLE 6.15

Area VIII-C INSPECT MATERIALS DELIVERED BY VENDORS (30-31)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Level of Tasks
Purchasing Agents	60	Daily	Routine procedure Minor decisions
Assistant P.A.	30	Several times a week Several times a month	Routine procedure
Storekeepers	80	Daily	Routine procedure Minor decisions
Administrators	30	Several times a year	Routine procedure Minor decisions
Accountants	0		
Department Heads	40	Daily Several times a week	Routine procedure Minor decisions
Supervisors	30	Several times a week Several times a month	Minor decisions
Workers	30	Several times a week Several times a month	Routine procedure Minor decisions

TABLE 6.16

Area VIII-D DELIVER MATERIALS TO STOREROOM OR USING DEPARTMENTS (32-33.2)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	60	Daily	Routine procedure Minor decisions
Assistant P.A.	30	Several times a week Several times a month	Routine procedure Minor decisions
Storekeepers	80	Daily	Routine procedure Minor decisions
Administrators	0		
Accountants	0		
Department Heads	20	Several times a week Several times a month	Routine procedure Minor decisions
Supervisors	20	Several times a week Several times a month	Minor decisions
Workers	0		

from requisitioning departments (30.411) to verify that correct items have been shipped.
Assistant purchasing agents at some institutions perform the tasks in this area, but on the average less frequently than purchasing agents do.
Storekeepers perform the tasks in this area daily, following a pattern similar to that of purchasing agents.
Administrators usually do not perform most of the tasks in this area, but at some institutions they process claims (30.31).
Accountants do not perform the tasks in this area.
Department heads perform the tasks in this area with varying frequencies when receiving for their departments is decentralized. At some institutions where most of the receiving functions are centralized, department heads may unpack materials (30, 30.1), check their condition (30.3), and verify that correct items and quantities have been shipped (30.41, 30.42) without necessarily performing the other tasks in this area. Processing of claims (30.31) and completing and routing of receiving reports (31) in particular probably are done only by the heads of departments for which purchasing and receiving are decentralized.
Supervisors perform the tasks in this area with varying frequencies when receiving for their departments is decentralized. Their pattern of task performance tends to be similar to that of department heads.
Workers at some institutions may unpack and check materials (30, 30.3, 30.4, 30.41), but usually they do not perform most of the tasks in this area.

Summary

Materials are unpacked and inspected daily by storekeepers at most institutions, and by purchasing agents at institutions where receiving is centralized as a function of the purchasing department. Using-department heads and supervisors perform these tasks with varying frequencies when receiving for their departments is decentralized; they may, at some institutions, perform some of the tasks in this area when receiving for their departments is centralized. While administrators usually do not participate in unpacking and inspecting materials, at some institutions they take responsibility for processing claims (30.31). The tasks in this area generally are considered by purchasing agents to be routine, although storekeepers consider processing of claims (30.31) to involve minor decisions. Using-department personnel tend to rate the tasks as a little more difficult; supervisors in particular consider many of the tasks to involve minor decisions.

16. Area VIII-D. Deliver Materials to Storeroom or Using Departments (32-33.2)

Purchasing agents perform the tasks in this area daily at institutions where the activities are not done by a separate receiving department. All of those who make deliveries of materials (32), however, do not follow the practice of obtaining the recipient's signature to verify delivery (32.1). Some purchasing agents leave verification of services to the requisitioning department (33.1) rather than performing this task themselves (33).

Assistant purchasing agents at some institutions deliver materials (32) but usually do not perform the other tasks in this area.

TABLE 6.17

Area IX-A. RETURN MATERIALS TO VENDORS (34-34.9)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	80	Several times a month Several times a year	Routine procedure Minor decisions
Assistant P.A.	50	Several times a year	Routine procedure Minor decisions
Storekeepers	70	Several times a month Several times a year	Minor decisions
Administrators	0		
Accountants	0		
Department Heads	20	Several times a month Several times a year	Routine procedure Minor decisions
Supervisors	10	Several times a month Several times a year	Minor decisions
Workers	0		

Storekeepers deliver materials (32, 32.1) daily; some, but not all of those who deliver materials, verify services and route receiving documents (33-33.2).
Administrators usually do not perform the tasks in this area, although some may occasionally verify services received (33).
Accountants do not perform the tasks in this area.
Department heads perform the tasks in this area several times a week or several times a month when receiving for their departments is decentralized.
Supervisors perform the tasks in this area several times a week or several times a month when receiving for their departments is decentralized.
Workers do not perform the tasks in this area.

Summary

Materials are delivered to storerooms or using-departments daily by storekeepers at most institutions and by purchasing agents at institutions where receiving is centralized as a function of the purchasing department. Using-department heads and supervisors perform these tasks with varying frequencies when receiving for their departments is decentralized. Most personnel consider these activities to involve minor decisions, although purchasing agents consider that delivery of materials and verification of services (32, 32.1,33) are only routine.

17. Area IX-A. Return Materials To Vendors (34-34.9)

Purchasing agents perform the tasks in this area several times a month or several times a year. At institutions which have a separate receiving department, however, the receiving department may handle the routing of documents and the shipping of materials (34.41 - 34.9), and the activities of the purchasing agent may be confined mainly to determining the disposition of materials and preparing covering documents (34-34.4).
Assistant purchasing agents at most institutions perform at least some of the tasks in this area; their pattern of task performance tends to be similar to that of purchasing agents, except that relatively more assistant purchasing agents perform the tasks of advising using departments of steps to be taken (34.5) and holding or routing materials to shipping (34.51, 34.52).
Storekeepers at most institutions perform the tasks in this area several times a month or several times a year.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads at some institutions notify purchasing of materials to be returned (34,34.1), but relatively few participate further in arranging the return of the materials (34.2 - 34.8).
Supervisors at some institutions may notify purchasing of materials to be returned (34, 34.1), but relatively few participate further in arranging the return of the materials (34.2 - 34.8).
Workers do not perform the tasks in this area.

Summary

The return of materials to vendors, usually no more frequently than several times a month, usually is handled by purchasing-department personnel. The

TABLE 6.18

Area IX-B. PROCESS OTHER OUTGOING SHIPMENTS (35-35.8)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	50	Several times a week Several times a month	Minor decisions
Assistant P.A.	30	Several times a week Several times a month	Minor decisions
Storekeepers	60	Several times a month Several times a year	Minor decisions
Administrators	0		
Accountants	0		
Department Heads	0		
Supervisors	10	Several times a year	Minor decisions
Workers	0		

tasks in this area are performed by purchasing agents and by storekeepers at most institutions. Relatively few using-department personnel, even in departments for which purchasing and/or receiving may be decentralized, perform these tasks. The tasks generally are either routine or require no more than minor decisions.

18. Area IX-B Process Other Outgoing Shipments (35-35.8)

Purchasing agents perform the tasks in this area, usually several times a month or several times a year, at institutions where they are not performed by a separate receiving department.
Assistant purchasing agents usually do not perform the tasks in this area. At some institutions, however, they may determine appropriate handling of shipments (35.2), prepare covering documents (35.3), and notify using departments of steps to take (35.4).
Storekeepers at many institutions perform most of the tasks in this area several times a month or several times a year.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads do not perform the tasks in this area; they may notify purchasing of goods to be shipped (35.1), but usually they do not participate further in the preparation of shipments.
Supervisors do not perform the tasks in this area.
Workers do not perform the tasks in this area.

Summary

Processing of other outgoing shipments, like the return of materials to vendors (Area XVII), is done by purchasing agents and storekeepers at infrequent intervals. Very few using-department personnel ever participate in the activities in this area. The tasks involve minor decisions.

19. Area X-A. Fill Storeroom Stock Requisitions (36-36.5)

Purchasing agents at many institutions perform the tasks in this area daily. All of those who fill stock requisitions and deliver materials to users, however, do not follow the practice of obtaining the recipient's signature for deliveries (36.41).
Assistant purchasing agents at some institutions perform the tasks in this area daily or several times a week.
Storekeepers perform the tasks in this area daily. Like purchasing agents, however, some do not obtain the recipient's signature for deliveries (36.41).
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads may perform the tasks in this area daily or several times a week when storeroom facilities for their departments are decentralized.
Supervisors may perform the tasks in this area daily or several times a week when storeroom facilities for their departments are decentralized.
Workers do not perform these tasks.

Summary

Storekeepers perform the tasks in this area daily. At many institutions,

TABLE 6.19

Area X-A. FILL STOREROOM STOCK REQUISITIONS (36-36.5)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	60	Daily	Routine procedure Minor decisions
Assistant P.A.	30	Several times a week	Routine procedure
Storekeepers	100	Daily	Routine procedure Minor decisions
Administrators	0		
Accountants	0		
Department Heads	20	Daily Several times a week	Routine procedure Minor decisions
Supervisors	10	Daily Several times a week	Minor decisions Select suitable procedure
Workers	0		

TABLE 6.20

Area X-B. SERVICE STOREROOM REPLACEMENT CARTS (37-37.4)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	60	Daily	Minor decisions Select suitable procedure
Assistant P.A.	0		
Storekeepers	40	Daily Several times a week	Routine procedure Minor decisions
Administrators	0		
Accountants	0		
Department Heads	10	Several times a week	Routine procedure Minor decisions
Supervisors	10	Several times a week	Minor decisions
Workers	0		

however, central storerooms apparently are under the direct management of the purchasing agents, who fill requisitions and make deliveries of materials daily. Using-department heads and supervisors may perform these tasks as often as daily when storeroom facilities for their departments are decentralized. The tasks in this area are considered by most personnel either to be routine or to require only minor decisions.

20. Area X-B. Service Storeroom Replacement Carts

Purchasing Agents usually do not handle the replacement carts (37.1, 27.3), but do prepare requisitions daily or several times a week to charge departments for what has been used (37.2), and route the requisitions to inventory control (37.4) if inventory control is not a function of the purchasing department.
Assistant purchasing agents do not perform the tasks in this area.
Storekeepers at some institutions perform the tasks in this area daily or several times a week.
Administrators do not perform tasks in this area.
Accountants do not perform the tasks in this area.
Department heads usually do not perform the tasks in this area, but at a few institutions they may do so daily or several times a week when storeroom facilities for their departments are decentralized.
Supervisors usually do not perform the tasks in this area, but at a few institutions they may do so daily or several times a week when storeroom facilities for their departments are decentralized.
Workers do not perform the tasks in this area.

Summary

Servicing of replacement carts, where they are used, probably is done mainly by storekeepers. Preparation and routing of requisitions to charge departments for items used (37.2, 37.4) is done daily or several times a week by purchasing agents, and by storekeepers at some institutions. Department heads and supervisors at a few institutions perform these tasks. The tasks either are routine or require only minor decisions.

21. Area XI-A Process Storeroom Stock Receiving Reports (38-39.3)

Purchasing agents at many institutions perform the tasks in this area daily.
Assistant purchasing agents at some institutions perform the tasks in this area several times a week.
Storekeepers at most institutions perform the tasks in this area daily.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads at few institutions perform the tasks in this area daily or several times a week, but usually do not forward receiving reports to purchasing (39.3).
Supervisors at few institutions perform the tasks in this area daily or several times a week.
Workers at some institutions perform the tasks in this area several times a week or several times a month, but do not forward receiving reports to purchasing (39.3).

TABLE 6.21

Area XI-A PROCESS STOREROOM STOCK RECEIVING REPORTS (38-39.3)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	60	Daily	Routine procedure Minor decisions
Assistant P.A.	40	Several times a week	Routine procedure Minor decisions
Storekeepers	70	Daily	Routine procedure Minor decisions
Administrators	0		
Accountants	0		
Department Heads	10	Daily Several times a week	Routine procedure Minor decisions
Supervisors	10	Several times a week	Routine procedure Minor decisions
Workers	30	Several times a week Several times a month	Routine procedure Minor decisions

Summary

Processing of storeroom stock receiving reports is done daily by storekeepers, and by purchasing agents at those institutions where the storerooms are under their direct management. Only small percentages of using-department heads and supervisors perform these tasks. The tasks either are routine or require only minor decisions.

22. Area XI-B. Process Storeroom Stock Requisitions (40-40.4)

Purchasing agents at many institutions perform the tasks in this area daily.
Assistant purchasing agents at some institutions bring the balance of charges up to date (40.3), but usually do not enter information into the system (40.1, 40.2) or forward requisitions to the accounting department (40.4).
Storekeepers at most institutions perform the tasks in this area daily.
Administrators do not perform the tasks in this area.
Accountants do not perform the tasks in this area.
Department heads at a few institutions perform the tasks in this area several times a week or several times a month.
Supervisors at a few institutions perform the tasks in this area, usually several times a week.
Workers do not perform the tasks in this area.

Summary

Storeroom stock requisitions are processed daily by storekeepers and by purchasing agents at institutions where the storerooms are under their direct management. The processing of requisitions for inventory control is done by relatively few using-department heads or supervisors, even when storeroom facilities for their departments are decentralized. The tasks either are routine or require only minor decisions.

23. Area XII-A. Receive Vendor Invoices And Collate Them With Other Documents (41-41.513)

Purchasing agents at most institutions perform the tasks in this area daily.
Assistant purchasing agents at some institutions receive documents (41-41.3) daily or several times a week, but collate them and take steps to locate missing documents (41.4-41.513) less frequently.
Storekeepers at a few institutions perform the tasks in this area daily.
Administrators at some institutions receive invoices (41.2, 41.3) daily or several times a week, but they usually do not receive copies of the issued purchase orders (41.1) or collate the documents (41.4-41.513).
Accountants receive and collate documents (41-41.4) daily; they may need to take steps regarding missing documents (41.51-41.513) only several times a month.
Department heads at a few institutions perform the tasks in this area with varying frequencies when accounting for their departments is decentralized. Some department heads may receive vendors' invoices (41.2) without collating them with other documents (41.4-41.513).
Supervisors at a few institutions perform the tasks in this area with varying frequencies when accounting for their departments is decentralized. Some may

TABLE 6.22

Area XI-B PROCESS STOREROOM STOCK REQUISITIONS (40-40.4)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	60	Daily	Routine procedure Minor decisions
Assistant P.A.	30	Several times a week	Routine procedure Minor decisions
Storekeepers	60	Daily	Routine procedure
Administrators	0		
Accountants	0		
Department Heads	10	Several times a week Several times a month	Routine procedure Minor decisions
Supervisors	10	Several times a week	Minor decisions
Workers	0		

TABLE 6.23

Area XII-A. RECEIVE VENDOR INVOICES AND COLLATE THEM WITH OTHER DOCUMENTS (41-41.513)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	70	Daily	Routine procedure Minor decisions
Assistant P.A.	30	Several times a week	Routine procedure Minor decisions
Storekeepers	20	Daily	Routine procedure Minor decisions
Administrators	50	Daily Several times a week	Routine procedure
Accountants	70	Daily	Routine procedure Minor decisions
Department Heads	10	Several times a week Several times a month	Routine procedure Minor decisions
Supervisors	10	Several times a week	Minor decisions
Workers	0		

receive purchase orders (41.1) and/or vendors' invoices (41.2) without collating them with other documents (41.4-41.513).
Workers do not perform the tasks in this area.

Summary

Collation of vendor invoices with other documents usually is done daily by purchasing agents and accountants, although at a few institutions the activities in this area may be performed by storekeepers. While administrators and using-department heads and supervisors at some institutions may receive invoices, they usually do not perform most of the tasks involved in collating them. Tasks involving the receipt of documents (41.1-41.3) are considered by most personnel to be routine, and those involving collation of documents (41.4-41.513) to require minor decisions.

24. Area XII-B. Check Invoices Against Purchase Orders And Receiving Reports, And Process Invoices For Payment (42-46.3)

Purchasing agents check invoices (42-42.5) and process them for payment (46, 46.1) daily; most, but not all, also approve them for payment (46.2, 46.3). They notify accounts payable of proper action after resolution of discrepancies (43), and forward corrected documents to accounts payable (45); they notify inventory control of corrections to be made (44.1, 44.11) if inventory control is not a function performed by the purchasing agent himself.
Assistant purchasing agents at some institutions may check vendor invoices (42-42.4) several times a week, but usually do not process and approve them for payment (46-46.3).
Storekeepers at a few institutions perform the tasks in this area daily or several times a week. Those storekeepers who check invoices also process and approve them for payment.
Administrators at some institutions perform most of the tasks in this area, several times a week. Some may refer to purchasing for resolution of discrepancies (43); others do not. They may notify accounts payable (44), but not inventory control (44.1, 44.11), of action to be taken after resolution of discrepancies.
Accountants check (42-42.5) and review (46,46.1) invoices daily, but usually do not approve them for payment (46.2). They usually refer discrepancies to purchasing (43) several times a month or several times a year.
Department heads at some institutions check invoices (42-42.5) several times a week or several times a month, and most, but not all, of those who do so also process and approve invoices for payment (46-46.2). Some of these department heads refer discrepancies to purchasing (43), but they do not notify inventory control of corrections to be made (44.1, 44.11).
Supervisors at some institutions check invoices (42-42.5) several times a week or several times a month; a few also process and approve invoices for payment (46-46.2).
Workers do not perform the tasks in this area.

Summary

Final processing of invoices for payment is done daily by purchasing agents and accountants, and at some institutions by administrators. At a few institutions these tasks are performed by storekeepers. Some using-

TABLE 6.24

Area XII-B. CHECK INVOICES AGAINST PURCHASE ORDERS AND RECEIVING REPORTS, AND PROCESS INVOICES FOR PAYMENT (42-46.3)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	80	Daily	Routine procedure Minor decisions
Assistant P.A.	30	Several times a week	Routine procedure Minor decisions
Storekeepers	20	Daily Several times a week	Routine procedure
Administrators	50	Several times a week	Routine procedure Minor decisions
Accountants	70	Daily	Minor decisions Select suitable procedure
Department Heads	20	Several times a week Several times a month	Routine procedure Minor decisions
Supervisors	20	Several times a week Several times a month	Minor decisions Select suitable procedure
Workers	0		

TABLE 6.25

Area XIII. MAINTAIN COMPLETE PURCHASING RECORDS (47-47.45)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	70	Daily	Routine procedure Minor decisions
Assistant P.A.	60	Daily	Routine procedure Minor decisions
Storekeepers	20	Daily	
Administrators	30	Several times a year	Routine procedure Minor decisions
Accountants	0		
Department Heads	10	Several times a week Several times a month	Routine procedure Minor decisions
Supervisors	20	Several times a week Several times a month	Minor decisions
Workers	0		

department heads and supervisors check invoices against purchase orders and receiving reports, and some of these complete the processing of invoices, while others apparently forward them to the purchasing departments or administrators for final processing. Checking invoices and resolving discrepancies (42-44.11) are considered by most personnel to involve minor decisions; final review and approval (45-46.3) are considered by administrators to be only routine, but by accountants to involve selection of procedures.

25. Area XIII. Maintain Complete Purchasing Records (47-47.45)

Purchasing agents maintain files on purchasing transactions (47-47.34) and correspondence (47.41) daily, and on vendor catalogues (47.45) daily or several times a week. Some, but not all, also maintain files on market surveys (47.42), budget data (47.43) and special projects (47.44) several times a year. Some employ a log book in which information is entered by purchase order numbers (47.3); others do not.
Assistant purchasing agents at most institutions perform at least some of the tasks in this area. Most, however, do not perform all tasks in the area.
Storekeepers at a few institutions maintain some files on purchasing transactions, but do not perform all the tasks in this area.
Administrators usually do not perform most of the tasks in this area, although a few maintain files several times a year on some matters related to purchasing (47.4-47.45).
Accountants do not perform the tasks in this area.
Department heads at a few institutions perform the tasks in this area with varying frequencies when purchasing for their departments is decentralized. Some may maintain files on matters related to purchasing (47.4-47.45) without maintaining files on all individual transactions (47-47.34).
Supervisors at a few institutions perform the tasks in this area with varying frequencies when purchasing for their departments is decentralized.
Workers do not perform the tasks in this area.

Summary

Complete purchasing records are maintained daily by purchasing agents and assistant purchasing agents. At a few institutions, storekeepers and administrators may maintain some records on matters related to purchasing. Some using-department heads and supervisors maintain purchasing records when purchasing for their departments is decentralized. The tasks in this area either are routine or require only minor decisions.

26. Area XIV. Dispose of Surplus Materials (48-53)

Purchasing agents at most institutions dispose of surplus materials several times a year. Only about half of these, however, follow special procedures for the disposal of hazardous materials (51.1).
Assistant purchasing agents at some institutions perform the tasks in this area several times a year.
Storekeepers at some institutions perform the tasks in this area several times a year.
Administrators at some institutions perform some of the tasks in this area several times a year.

TABLE 6.26

Area XIV. DISPOSE OF SURPLUS MATERIALS (48-53)

Occupational Category	Percentages Performing Tasks	Modal Frequencies of Performance	Difficulty Levels of Tasks
Purchasing Agents	60	Several times a year	Minor decisions
Assistant P. A.	30	Several times a year	Routine procedure Minor decisions
Storekeepers	20	Several times a year	Routine procedure Minor decisions
Administrators	30	Several times a year	Minor decisions
Accountants	0		
Department Heads	20	Several times a year	Routine procedure Minor decisions
Supervisors	10	Several times a month Several times a year	Minor decisions
Workers	0		

Accountants do not perform the tasks in this area.
Department heads at some institutions determine the disposition of surplus materials and carry out the disposal (48-51.1), but relatively few of these complete the financial arrangements (52.1, 52.2) and authorize the release of the materials (52.3).
Supervisors usually do not perform the tasks in this area.
Workers do not perform the tasks in this area.

Summary

The tasks involved in disposal of surplus materials are performed several times a year, usually by purchasing agents but at a few institutions by storekeepers or by administrators. At a few institutions, using-department heads perform some of these tasks, but usually leave completion of financial arrangements and authorization of the release of materials to higher authority. The tasks in this area generally involve minor decisions.

IV. DISCUSSION

The survey questionnaire results indicate that almost all hospitals have purchasing departments and some degree of centralization of purchasing. It is usual, however, for pharmacy and dietary department heads to do much of the purchasing for their departments even where purchasing for other using departments is done by a purchasing department. The purchasing department at smaller institutions often, but not always, consists of only a purchasing agent who performs some functions which at larger institutions may be performed by lower level personnel within the purchasing department. At Extended Care Facilities, which usually do not have purchasing departments, some purchasing functions may be performed centrally by administrators and others by using-department personnel.

There seems to be no generally consistent division of responsibility for different functions in the purchasing area between purchasing-department personnel and using-department personnel. In many areas of activity, task performance appears to be determined more by specific institutional and/or departmental requirements than by the occupational classifications of the personnel who carry out the activities.

It is possible to distinguish some areas of activity in which nearly all storekeepers are involved, and certain areas related to accounting in which most accountants are involved. Most of the activities in these areas, however, also are performed by some using-department heads and supervisors. The latter, when they are responsible for purchasing, tend to perform many of the same activities as purchasing agents.

The supervision and difficulty data obtained from the survey provide relatively little information of value for curriculum construction. There were no evident distinctions between occupational categories concerning extent to which personnel tended to be supervised in the performance of their tasks. In general, it can be said that all purchasing functions are performed with little or no direct supervision from higher authorities, no matter who performs them at particular institutions. The majority of tasks are regarded by those who perform them as either routine or requiring only minor decisions, and are not judged to require anything more difficult than the selection of suitable procedures. Even in those few areas in which a substantial number of tasks involve the selection of suitable procedures, this level of difficulty would seem not so high as to make the tasks inappropriate for performance by any of the occupational categories, except perhaps workers.

Considerable qualifications of the survey results are required if they are to determine specific tasks for inclusion in a given instructional unit. From an examination of Appendix F, it can be seen that in most areas there are variations in the percentages of personnel performing the individual tasks. In several areas such variations for some occupational categories are rather large. Many tasks which are performed by relatively few respondents in an occupational category, however, are complementary to other tasks performed by higher percentages of respondents; often it is difficult

to see any reason why some respondents should not perform all related tasks. It may be necessary to make a distinction between tasks performed and tasks that ought to be performed. The survey can provide information only about the former, but it is important that the latter should not be excluded from an instructional unit on no other evidence than performance by relatively low numbers of personnel. Frequencies of performance of tasks also are not very meaningful without consideration of the nature of the tasks. Some tasks may be essential but their performance is required only at infrequent intervals.

The trends in task performance for what appear to be the major occupational groupings are discussed below.

Purchasing agent, assistant purchasing agent, (and storekeeper)

It would appear from the results of this survey that the job of an assistant purchasing agent is very similar to that of a purchasing agent. Although in a subordinate position, an assistant purchasing agent seems usually to carry out most of the same activities as a purchasing agent. There are no general functions and few if any specific tasks that either are performed only by purchasing agents and not by assistant purchasing agents or are always delegated to assistant purchasing agents rather than being performed by purchasing agents. While some task performance differences between purchasing agents and assistant purchasing agents appear in the survey results, these may be more indicative of differences between larger and smaller purchasing departments than of functional differences between the jobs of purchasing agent and assistant purchasing agent. At some institutions purchasing agents are assisted by a staff; at others they have no staff. When a purchasing department is large enough to include an assistant purchasing agent, it is likely also to include other lower level personnel who may perform some of the tasks which in smaller departments are performed by the purchasing agent. Five of the seven assistant purchasing agent respondents in this survey were in departments whose personnel included secretaries and/or clerks. It is possible, therefore, that the observed percentages and/or frequencies of performance of some tasks are higher for purchasing agents than for assistant purchasing agents because relatively more purchasing agents work without secretarial or clerical assistance.

At most institutions, the activities of a storekeeper tend to be limited to areas concerned with receiving and storage. A few storekeepers, however, have much more extensive responsibilities in the field of purchasing, and occupy a position that is virtually equivalent to that of a purchasing agent. The activities of these individuals, together with assistant purchasing agents, can best be described in terms of the functions performed by purchasing agents.

The basic core of a purchasing agent's job consists of completing the processing of requisitions, evaluating products and suppliers, and preparing purchase orders (areas IV-VII). These functions are performed with high frequencies by almost all purchasing agents, assistant purchasing agents, and storekeepers who act as purchasing agents. Most, but not all, purchasing agents, maintain complete purchasing records (area XIII) and

dispose of surplus materials (area XIV). The determination of needs and preparation of requisitions (areas I-III) are functions which purchasing agents may perform for their own departments as users of supplies (e.g., stationery, office equipment). Purchasing agents also may participate with administrators and using-department personnel in determining needs for other departments.

Receiving (areas VIII-IX), storage (areas X-XI) and processing of invoices (areas XII) are areas in which many purchasing agents either exercise some general supervision or themselves perform the activities. At some institutions, one or another of these functions may be performed by other personnel, but at others they may be part of a purchasing agent's duties, particularly at institutions where purchasing is a one-man operation. Relatively fewer assistant purchasing agents perform these functions, since institutions at which the position of assistant purchasing agent exists are more apt to have separate departments or divisions whose personnel perform them.

Storekeeper

The activities of a storekeeper, unless his position really is more that of a purchasing agent than simply a storekeeper, usually are confined to receiving and storage functions (areas VIII-XI). Storekeepers typically receive, inspect and deliver materials (area VIII), fill stock requisitions (area X-A), and process receiving reports and stock requisitions (area XI) daily. Most storekeepers also handle the return of materials to vendors (area IX-A) and process other outgoing shipments (area IX-B), but at relatively infrequent intervals. At institutions where storeroom replacement carts are used, their servicing (area X-B) may be one of the responsibilities of the storekeeper.

Outside those areas directly concerned with receiving and storage, storekeepers may do some editing of requisitions submitted by using departments (area IV) and may determine sources of supply among current suppliers (area V-A). Other purchasing functions generally are not performed by storekeepers.

Administrator

At some smaller institutions, administrators may carry out some purchasing activities, but they do not perform all, or even most, of the functions which typically are performed by a purchasing agent. The activities of an administrator at most larger institutions probably are confined mainly to determining overall institutional needs (area I). The majority of the respondents perform this function, but they tend to do so less frequently than other personnel, which may indicate that they participate mainly at more advanced stages of planning.

Most of the administrators in the respondent sample were at small hospitals and Extended Care Facilities (cf. Table 1, page 5), and the survey results, therefore, are mainly descriptive of performance by administrators at the kinds of institutions which are most numerous and at which administrators are most likely to be involved in purchasing. The principal functions

which administrators at these institutions perform are determining needs (area I), reviewing requisitions prepared by users (area III), giving final approval to requisitions (area IV), and processing of vendor invoices after purchasing transactions have been completed (area XII). Some administrators also may evaluate and select suppliers (area V), inspect materials delivered by vendors (area VIII-C), maintain purchasing records (area XIII), and dispose of surplus materials (area XIV). Except for the last, however, they tend to perform these functions much less frequently than a purchasing agent would do. Those who participate most extensively in purchasing activities are the administrators at Extended Care Facilities, which typically do not have any other centralized purchasing agency. Even at institutions where administrators act as their own purchasing agents, however, many functions that normally would be performed by a purchasing agent apparently are left to using-department personnel to perform.

Accountants

The only purchasing function regularly performed by accountants is the final processing of vendor invoices (area XII). They usually do not, however, have authority to approve the invoices for payment. Accountants also may occasionally participate in determination of needs and budget preparation (area I), but typically they do not perform any other functions related to purchasing.

Using department head, supervisor, worker

The extent to which using-department personnel participate in purchasing activities varies with the kind of department. Purchasing for pharmacy and dietary departments tends to be decentralized at most institutions, regardless of an institution's size or the size of its purchasing department. Purchasing for other departments tends to be centralized, except perhaps at some small institutions that do not have purchasing departments.

Most department heads and supervisors, but not workers, determine departmental needs (area I), and using-department personnel at all levels prepare requisitions (area II). Some department heads and supervisors also review requisitions (area III). Personnel in departments for which purchasing is centralized usually do not perform any further purchasing functions. In departments for which purchasing is decentralized, however, department heads and supervisors may carry out more or less the same activities as purchasing agents, although less frequently since they are serving the needs of only a single department. Non-supervisory workers, on the other hand, usually have little to do with purchasing functions apart from the preparation of requisitions.

The functions which comprise the core of a purchasing agent's job (area IV-VII) are performed by approximately 30-40% of department head respondents and 20-30% of supervisor respondents, most of whom are in pharmacy or dietary departments. Except for the inspection of materials delivered by vendors (area VIII-C), smaller percentages perform functions in the areas of receiving (areas VIII-IX), storage (areas X-XI), and processing

of invoices (area XII). Departments may be served by central facilities in one or more of these areas even when other purchasing functions are decentralized.

V. RECOMMENDATIONS AND CONCLUSIONS

The survey results suggest that certain approaches to curriculum development would be inappropriate. While almost all hospitals have purchasing departments and some degree of centralization of purchasing, pharmacy and dietary department heads often perform many purchasing functions for their departments. In some smaller hospitals and in Extended Care Facilities, which usually do not have purchasing departments, some purchasing functions may be performed by administrators, and others by using-department personnel. The lack of conformity among institutions and departments, therefore, might preclude development of any one general purchasing curriculum that would suit the needs of all personnel who engage in purchasing activities. The results do show, however, (Table 3, Page 10), the presence of personnel in health care facilities whose major areas of responsibility are purchasing.

When purchasing functions are shared between purchasing-department personnel and using-department personnel, there seems to be no generally consistent division of responsibility according to occupational classifications. In many areas of activity, task performance appears to be determined more by specific institutional preferences or requirements than by the occupational titles of the personnel involved. Occupational classifications, thus, would not serve as a definitive guide to the construction of curricula.

Curricula in the field of purchasing might best be constructed by developing instructional units, each of which would cover a circumscribed area of tasks that relate to a common function. The 26 areas into which tasks were grouped for this report (cf. Section III. Results) were intended to serve as first approximations of the subject matter for such instructional units.

These units would provide flexibility in the composition of curricula to meet the varied needs of different health care institutions. It would be possible to combine units to form general courses of instruction that could be taught at levels up to that of Associate degree for purchasing personnel, and also to select individual units that specific institutions might require for pre-service or in-service training programs for administration department heads and other personnel.

The effective use of modular curriculum for training medical facility personnel in purchasing activities should assist in curbing the rise in medical care costs, whether or not the individual's primary assignment is purchasing.

APPENDIX A

SOURCES FOR PURCHASING TASK LIST

Alford, L.P., and Borgs, John R., Production handbook. New York: Ronald, 1951.

Goldthorpe, John C. (Assistant Administrator, St. Joseph's Hospital of Burbank, Burbank, California). Miscellaneous purchasing procedure and policy material, and personal conversation.

Lamar, Lee, Jr., and Dobler, Donald W. Purchasing and materials management. New York: McGraw-Hill, 1965.

Nusser, Richard (Director of Purchasing, Cedars-Sinai Medical Center, Los Angeles, California). Personal conversation.

Sacred Heart Hospital, Spokane, Washington. Purchasing department procedure manual.

United Hospital Fund of New York. The procurement cycle: requisition and purchasing systems. New York, 1968.

Veterans Administration, Los Angeles, California. Supply procedures.

Westing, J.H., and Pine, I.V. Industrial purchasing, 2nd edition. New York: Wiley, 1961.

"The Catholic Hospital Association Hospital Purchasing Administration Correspondence Course", St. Louis, Missouri, 1962.

APPENDIX B

NATIONAL TECHNICAL ADVISORY COMMITTEE FOR PURCHASING

Mr. Samuel White (Chairman)
Director of Purchasing and Supply Services
American Hospital Association
Chicago, Illinois

Mr. Edward A. Behrman
Coordinator, Center for Hospital Continuing Education
St. Louis University
St. Louis, Missouri

Mr. John C. Goldthorpe
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St. Joseph's Hospital
Burbank, California

Dr. Lamar Lee
Professor of Purchasing
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Mr. Kenneth A. Weydert
Material Manager, Purchasing Department
University of California
Los Angeles, California

Dr. Harold E. Fearon
Professor of Management
Arizona State University
Tempe, Arizona

APPENDIX C-1

INSTRUCTIONS TO SURVEY ADMINISTRATOR

The Purchasing Questionnaire is possibly one of the most complicated surveys that you will have to handle because the entire hospital or nursing staff may be involved with the Purchasing Function. Therefore, the instructions are presented twice. The first section analyzes the major Roman numeral headings of the task list by individual, and the second section presents those individuals who might complete the survey and lists what sections they might accomplish.

EXPLANATION BY TASK HEADING

I Identify and Verify the Need.

A. The hospital administrator

B. Two department heads (dietary, housekeeping, nursing, 2 out of 3)

C. One non-supervisory individual who reports to one of the department heads selected in B, above.

II Prepare the Requisition

A. A department head who prepares requisitions

B. A first line supervisor who prepares requisitions

C. An individual in a department who prepares requisitions

III Approve the Requisition and forward to purchasing or stores.

A. The administrator who approves requisitions

B. A department head who approves requisitions (suggest any from I,B.)

C. A first line supervisor who approves requisitions if appropriate. (Note: in some cases there will be no one at this level who approves requisitions.)

IV Review Purchasing Requisition

A. Centralized purchasing. (Note: under a centralized purchasing program the purchasing department may accomplish Task List functions IV through XIV except for the Accounts Payable portion of XII, Process Vendor Invoice; therefore, select the correct individual from the purchasing department).

B. In a decentralized purchasing operation every department will probably accomplish section IV through XIV. Therefore, select the appropriate person in dietary, housekeeping, and nursing.

V Determine source of supply

A. Centralized Purchasing--select individual or individuals in Purchasing department.

B. Decentralized Purchasing--select the individual or individuals in the dietary, housekeeping, and nursing nursing department who accomplishes this task.

VI Place the Order

A. Centralized Purchasing--select individual or individuals from Purchasing department.

B. Decentralized Purchasing--select the individual or individuals in housekeeping, nursing, and dietary who accomplish this function.

VII Follow up and Expedite the Order

A. Centralized Purchasing--select the individual or

individuals in purchasing department who accomplish this task.

B. Decentralized Purchasing--select the individual or individuals in housekeeping, dietary, and nursing who accomplish this task or group of tasks.

VIII Receive and Inspect Materials and Services

A. Centralized--the individual or individuals in either the stores or receiving function or purchasing function who accomplish this for the total hospital.

B. Decentralized--the individual or individuals in housekeeping, dietary, and nursing who accomplish this function. (Note: it may be possible to have decentralized purchasing and still have a centralized receiving program).

IX Return to Vendor and Outgoing Shipments

A. Centralized Purchasing--individual or individuals in purchasing and/or stores or receiving function who accomplish this task.

B. Decentralized Purchasing--the individual or individuals in housekeeping, dietary, and nursing who accomplish this task for the decentralized program.

X Issue Storeroom Stock Requisitions

A. Centralized Purchasing--the individual or individuals in the storeroom (purchasing department) who handle this function

B. Decentralized Purchasing--the individual or individuals in the housekeeping, dietary, and nursing department who accomplish this function. (Note: again, there may be an example of decentralized purchasing. However, you may have a centralized storeroom function.)

XI Maintain Inventory Control

A. Centralized Purchasing--the individual or individuals in the storeroom and/or purchasing department who accomplish this task.

B. Decentralized Purchasing--the individual or individuals in the housekeeping, nursing, and dietary department who accomplish this task.

XII Process Vendor Invoice

A. Centralized Purchasing--this function may occur in the accounts payable department or in the purchasing department.

B. Decentralized Purchasing--this function may still occur in the accounts payable department but may occur in the housekeeping, dietary, and nursing department.

XIII Maintain Purchase Records

This is specifically designed for a centralized purchasing function and should only be completed when purchasing maintains a centralized purchasing record system.

XIV Disposal of Surplus Materials

A. Centralized Purchasing--Could be handled by the receiving

or purchasing department.

B. Decentralized Purchasing--may be handled by the housekeeping, nursing, and dietary departments. In this case, again, you may have decentralized purchasing. However, you may have centralized storeroom for handling surplus materials.

EXPLANATION BY INDIVIDUAL
(Individuals and what sections they might complete)

A. Hospital Administrator

1. May complete section "I" Identify and Verify the Need.
2. May complete section "III" Approve the Requisition and Forward to Purchasing or Stores.

B. Department Head--Housekeeping, Nursing, and Dietary

1. May complete section "I" Identify and Verify the Need.
2. May complete section "II" Prepare the Requisition.
3. May complete section "III" Approve the Requisition and Forward to Purchasing or Stores.
4. May complete section "IV" Review Purchasing Requisition--under a decentralized purchasing system.
5. May complete section "V" Determine Source of Supply--under a decentralized purchasing system.

C. First Line Supervisor in Housekeeping, Nursing, and Dietary Depts.

1. May complete section "I" Identify and Verify the Need.
2. May complete section "II" Prepare the Requisition.
3. May complete section "III" Approve the Requisition and Forward to Purchasing or Stores.

D. Individual or Individuals in Housekeeping, Nursing, and Dietary Departments

1. May complete section "II" Prepare the Requisition.

2. May complete section "III" Approve the Requisition and Forward to Purchasing or Stores.
3. May complete section "IV" Review Purchasing Requisition--under a decentralized purchasing system.
4. May complete section "V" Determine Source of Supply--under a decentralized purchasing system.
5. May complete section "VI" Place the Order--under a decentralized purchasing system.
6. May complete section "VII" Follow up and Expedite the Order--under a decentralized purchasing system.
7. May complete section "VIII" Receive and Inspect Materials and Services--under a decentralized purchasing system.
8. May complete section "IX" Return to Vendor and Outgoing Shipments--under a decentralized purchasing system.
9. May complete section "X" Issue Storeroom Stock Requisition--under a decentralized purchasing system.
10. May complete section "XI" Maintain Inventory Control--under a decentralized purchasing system.
11. May complete section "XII" Process Vendor Invoice--under a decentralized purchasing system.
12. May complete section "XIV" Dispose of Surplus Materials--under a decentralized purchasing system.

E. Purchasing Department (centralized purchasing system).

The following individuals may complete the questionnaire: Purchasing Department Head, Purchasing Agent, buyer, storeroom clerk, receiving clerk, inventory clerk, distribution clerk, and other appropriate individuals working specifically in the purchasing function.

Sections IV through XIV would be accomplished by the above individuals when that function is handled by the purchasing department. Note: section XIII Maintain Purchasing Records should only be completed when this department does the function.

F. The Accounting Department and/or the Accounting Personnel may complete section XII Process Vendor Invoice.

APPENDIX C-2

INSTRUCTIONS TO RESPONDENTS

This is part of a project to develop new courses of study and instructional materials for persons in the allied health professions. To find out what should be taught and how best to teach it, we must find out what tasks or functions really are performed by persons such as you who are working in the field.

We are asking the cooperation, therefore, of employees in a small, selected group of hospitals throughout the United States. You are one of these employees. YOUR ANSWERS ARE IMPORTANT!!

This is a confidential document for research purposes only. Your identification card will be kept separate from your answers to the questionnaire. Answers will be prepared for data processing and results will be reported by group only, not by individual.

INSTRUCTIONS.

We have gathered a listing of many of the tasks in your area of patient care or hospital services. This list contains tasks which might be done by anyone concerned with your area. Not all tasks will be done by all people. We would like to know the answers to three questions.

1. Frequency--how often do you perform this task.

2. Difficulty--how difficult is the task, primarily in terms of decision making and steps involved.

3. Supervision--are you supervised on this task or do you work without supervision.

Please read through the entire questionnaire first, placing a check mark next to those tasks you do. Then, go back over the list of tasks and answer the other questions about those tasks you actually do. Use the blank spaces provided to add tasks which you do that we may have omitted. Please read each task carefully and "X" the box in the appropriate column to show your answer. Our results depend to a great extent on how carefully you fill out this questionnaire!!

Our project will have a survey administrator in your area. He will leave this questionnaire with you and will pick it up _____.

His name is _____. His telephone number is _____. Please feel free to call him if you have any questions.

Going through each question now:

(a) The question on frequency is "How often do you do this task?" The possible answers are:

1. Daily or almost daily
2. Several times a week
3. Several times a month
4. Several times a year
5. Never or almost never

(b) Supervision--How much supervision do you get for this task?

1. All the time
2. Most of the time
3. Occasionally
4. Rarely
5. No supervision

(c) Difficulty--How difficult is this task?

1. Routine procedure
2. Several procedures with minor decisions
3. Select the most suitable procedures
4. Establish and/or modify procedures to meet individual circumstances
5. Making complex decisions with little precedent

We thank you for your cooperation, and hope that the instructional materials which we develop in conjunction with this study will be helpful to you, and to others entering your profession.

When you have finished, please enter at the bottom of the questionnaire the length of time it took you to answer all the questions. This is for our information, to help us make it easier and shorter for others in the future.

C O N F I D E N T I A L D O C U M E N T

For Research Purposes Only

APPENDIX C-3

BACKGROUND INFORMATION INVENTORY

I.D. Number_____

Please complete this Information sheet now and return it with the completed task questionnaire. The answers to these questions are of importance as we try to evaluate responses from a large number of people across the United States where educational and licensure requirements for specific tasks may be very different.

Remember, this is a confidential document, it is identified by number only, and will not be attached to your name.

1. RESPONDENT:

   1.1 Position Title_____

   1.2 Area of Patient Care or Hospital Services, i.e., Medical-Surgical, Physical Medicine, Psychiatric, Medical Records, etc. Please specify:

   _____

   _____

   1.3 Length of Time in Present Position_____

   1.4 Age_____

   1.5 Sex (circle one) M F

   1.6 Marital Status (circle one)

   Married Single Widowed Divorced Separated

2. PREVIOUS EXPERIENCE:

	Type		Years
2.1	_____	2.2	_____
	_____		_____
	_____		_____

3. Highest Grade Completed Before Entering Educational or Training Program for your present occupation: (circle one)

   1 - 8, 9, 10, 11, 12, Some College Baccalaureate

   Post-Baccalaureate

4. Highest Educational or Training Program Completed within Present Occupation: (circle the number next to your answer)

   4.1 -- None

   4.2 -- On-Job Training: How Long? (circle one)

   2 wks. 1 mo. 2 mos. 3 mos. longer than 3 mos.

   4.3 -- Certificate or Diploma Program: (circle one)

   less than 1 yr. 1 yr. 2 yr. 3 yrs. or more

   4.4 -- Associate Degree

   4.5 -- Baccalaureate Degree

   4.6 -- Post-Baccalaureate Degree

5. Certification, Licensure, Registration Held, i.e., C.D.A., A.R.T., O.T.R., R.N., L.V.N.

   Please specify: _____

6. (Optional) Yearly Salary Range for full-time: (circle one)

   6.1 -- Less than 2,000

   6.2 -- 2,000 - 3,999

   6.3 -- 4,000 - 6,999

   6.4 -- 7,000 - 9,999

   6.5 -- 10,000 or more

C O N F I D E N T I A L D O C U M E N T

FOR RESEARCH PURPOSES ONLY

P U R C H A S I N G

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
I. Identify and Verify the Need (To be completed by the Using Department)															
1. Participate in the preparation of supplies, service and equipment budget, including make, buy or lease decision and standardizatio	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
2. Identify the types of supplies and services required for attainment of the unit's objectives.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
3. Consult with the purchasing/procurement office in establishing appropriate quality and quantity standards.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
4. Assist in determining storage location and levels in terms of time or usage.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
4.1 unit	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
4.2 storeroom	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
5. Submit requisition to maintain stock levels.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
6. Process orders to fill unanticipated needs.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
II. Prepare the Requisition (to be completed by the Using Department)															
7. Complete the standard requisition for purchasing and/or stores.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
7.1 Enter requisitioning unit identification.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
7.2 Enter date on which the requisition was prepared.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

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Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

II. 7. (continued)	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
7.3 Enter quantities of the items required.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
7.4 Enter descriptions of the items required in sufficient detail to identify the products or services.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
7.5 Enter date on which the non-stock items will be needed.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
7.6 Enter justification and anticipated usage if items are not standardized expendable supplies.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
7.7 Enter name of the requisitioner.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
8. Forward the purchasing requisition to the approving authority if necessary.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
III. Approve the Requisition and Forward to Purchasing or Stores (to be completed by the Using Dept. and/or Administration)															
9. Requisition received by approving authority.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10. Receipient determines if he has approval authority.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.1 Determine if requisition is for routine expendable supplies and in usual ordering quantities;check with purchasing if necessary	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.11 Determine if within budget	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.12 Check with requistioning unit if not satisfied;modify as needed, approve and forward to purchasing	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

III. 10. (continued)	FREQUENCY — How often do you do this task?					SUPERVISION — How much supervision do you get for this task?					DIFFICULTY — How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions- Little precedent
10.13 Approve requisition if satisfied and forward to purchasing or stores.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.2 Forward to superior purchasing authority for approval if purchasing authority does not reside at recipient level.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.21 Check with department to justify requisition if necessary.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.22 Determine price/cost.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.23 Check to see if item is within budget.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.24 Justify to higher authority if appropriate.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.25 Forward to higher approving authority.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.3 Approving authority considers approval.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.31 If disapproved, reject, or return to sender for reconsideration.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
10.32 If approved, forward to purchasing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
IV. Review Purchasing Requisition (to be completed by the Purchasing Department)															
11. Purchasing Department receives requisition	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

IV. 11. (continued)	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
12. Edit requisition for:															
12.1 Budgetary information.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
12.2 Specifications.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
12.3 Quantity.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
12.4 Approval authority.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
12.5 Query requisitioner if information is incomplete.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
13. Number requisition if necessary and assign to buyer.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
14. Value analyze and recommend changes if desirable.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
15. Approve for purchase.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
V. Determine the Source of Supply (to be completed by the Purchasing Department)															
16. Pre-determine sources.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
16.1 Current contracts.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

V. 16. (continued)	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
16.2 Small orders.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
16.3 Emergency purchase.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
16.4 Should the need be immediate, select a vendor on the basis of past reliability, order the smallest quantity meeting the need and then perform a product evaluation.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
16.5 Traveling purchasing requisition.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17. Determine potential suppliers.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.1 Consider current catalogs and reference material including purchasing records.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.2 Consult with unit making request if necessary.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.21 Evaluation committee develops criteria by which competing products that meet the item specification may be judged.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.22 Evaluate the products in terms of criteria.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.23 Rate the products and report the information to the buyer.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.3 Consider vendors with whom a supplier relationship already exists.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.4 Confer with other purchasing departments.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.5 Consult with local professional organizations.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
17.6 Select qualified suppliers.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
18. Evaluate selected suppliers where sources need to be determined.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

V. 18. (Continued)

	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
18.1 Technical capability	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
18.2 Financial capability	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
18.3 Management capability	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
18.4 Logistic capability	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
18.5 Capacity capability	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
19. Obtain buying information and samples where sources need to be determined.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
19.1 Use published price lists where prices are fixed by the vendors if feasible.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
19.2 Use competitive bids if the following critera exist.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
19.21 If specifications are clear to both buyer and seller.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
19.22 If 3 or more potential suppliers are willing to compete.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
19.23 If dollar volume is sufficient (above minimum bid policy)	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
19.24 If time permits (If time available is sufficient for competitive bidding).	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
19.3 Negotiate if competive bidding and use of price lists are impractical.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
20. Complete the requisition	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
20.1 Enter date ordered	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

V. 20. (Continued)

	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions little precedent
20.2 Enter order number corresponding to the number on the first available blank purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
20.3 Enter quantity ordered if different from that shown in requisition.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
20.4 Enter name and address of vendor from whom the purchase is to be made based on supplier meeting criteria.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
20.5 Enter price,delivery, packing specifications and method of shipment.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
20.6 Enter other appropriate specifications (patents, warrantees, etc.)	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
20.7 Attach the available blank purchase order to the non-stock purchasing requisition and forward to purchase order preparation desk.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
VI. Place the order (to be completed by the Purchasing Department)															
21. Check to see that the information contained on the requisition is sufficien to permit the preparation of a purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.1 Return requisition and blank purchase order to the buyer for resolution, if information not sufficient.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.2 Prepare purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.21 Enter date of issue	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.22 Enter number if not already entered.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

VI. 21. (continued)

	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
21.23 Enter name and address of vendor.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.24 Enter expected date of delivery.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.25 Enter quantity	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.26 Enter description.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.27 Enter price.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.28 Enter typed name of buyer.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
21.29 Enter conditions or terms of the purchase (if applicable or not pre-printed).	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
22. Buyer review and sign purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
23. Distribute copies of purchase order and requisitions as appropriate.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
VII. Follow up and Expedite the Order (to be completed by the Purchasing Department)															
24. Check open purchase orders including incomplete shipments and expedite where necessary.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
25. Check with using department if shipment delayed to determine criticality.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

VII. 25. (continued)	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
26. Take appropriate measures.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
VIII. Receive, Inspect, Materials and Services (to be completed by the Purchasing Department --Receiving)															
27. Receive and file receiving copy of purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
27.1 File receiving copy of purchase order in alphabetical file by name of vendor and then by purchase order number.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
28. When carrier arrives at loading dock, check carrier's manifest to ascertain proper delivery addressee.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
28.1 Check with purchasing or other appropriate department(s) if necessary.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
28.2 Re-direct carrier, if not proper delivery addressee.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
29. Participate in unloading and check shipment, if proper delivery addressee.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
29.1 Locate receiving department copy of purchase order applicable to shipment delivery and compare with carrier's manifest.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
29.2 If in order, participate in unloading containers from carrier's vehicle.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
29.3 Compare number of shipping containers unloaded against carrier's manifest to make certain they agree.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
29.31 Note shortage, if any, on carrier's receipt which receiving clerk signs.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

VIII. 29. (Continued)

		FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
		Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions- Little precedent
29.4	Inspect shipping containers for external damage.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
29.41	Any damage found should be inspected by carrier's driver and noted on carrier's receipt which receiving clerk signs.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
29.5	Receiving clerk dates and signs carrier's receipt relieving carrier of responsibility for loss or damage to materials other than noted on receipt, or concealed damage.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.	Unpack and inspect materials.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.1	Unpack materials and locate vendor's packing slip.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.2	From information on packing slip identify name of vendor and, if indicated, number(s) of purchase order(s) involved.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.3	Check general condition of materials to determine if any damage was incurred during shipment.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.31	Process claim.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.4	Check materials received against vendor's packing slip and applicable purchase orders.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.41	Verify that correct items have been shipped.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.411	If necessary, request assistance of requisitioning department.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
30.42	Verify that correct quantities have been shipped.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
31.	Complete and route receiving report.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
32.	Deliver materials to storeroom or to requesting department as shown on purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
32.1	Obtain signature of person on receiving report to show materials were delivered.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

VIII. 32. (Continued)

	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never/ Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
33. Verify services received.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
33.1 Requisitioning department verifies that services have been satisfactorily performed as requested.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
33.2 Receiving documents are routed to appropriate department for processing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
IX. Return to Vendor and Outgoing Shipments (to be completed by the Purchasing Department --Receiving/Shipping)															
34. Materials to be returned to vendor.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.1 Using Department notifies purchasing of goods to be returned to vendor.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.2 Purchasing verifies that return is authorized.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.3 Purchasing determines appropriate disposition.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.4 Purchasing prepares covering documents.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.41 Route documents to appropriate departments.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.5 Purchasing advises Using Departments of steps to be taken.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.51 Hold materials for further instructions.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

IX. 34. (continued)

	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions- Little precedent
34.52 Route materials to shipping (receiving) with request for return	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.6 Shipping (receiving) prepares necessary shipping documents.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.7 Shipping (receiving) arranges for pickup as necessary.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.8 Carrier provides receipt for pickup of materials.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
34.9 Shipping (receiving) routes documents to appropriate departments.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35. Other outgoing shipments.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.1 Using Department notifies purchasing of goods to be shipped.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.2 Purchasing determines appropriate handling.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.3 Purchasing prepares covering documents and routes to appropriate departments.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.4 Purchasing notifies Using Department of steps to take.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.41 Hold materials for further instructions.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.42 Route to shipping (receiving) with request for shipment.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.5 Shipping (receiving) prepares necessary shipping documents.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.6 Shipping (receiving) arranges for pickup as necessary.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
35.7 Carrier provides receipt for pickup of materials.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
IX. 35. (Continued)															
35.8 Shipping (receiving) routes documents to appropriate departments.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
X. Issue Storeroom Stock Requisitions (to be completed by the Purchasing Department --Storeroom)															
36. Storeroom receives stock requisition.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
36.1 Check requisition.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
36.11 For validity.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
36.12 For proper authorization.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
36.2 Fill approved requisition with items from stock.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
36.3 Indicate on requisition quantities of stock dispensed.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
36.4 Deliver materials to requesting department as shown on stock requisition.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
36.41 Obtain signature of authorized person to whom materials were delivered on stock requisition.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
36.5 Forward stock requisition to inventory control.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
37. Storeroom services exchange carts.															

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

X. 37. (Continued)	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
37.1 Determine what Using Department has taken from replacement cart.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
37.2 Prepare requisition to charge department for what has been used.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
37.3 Restock cart to quota capacity.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
37.4 Route requisition to inventory control.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
XI. Maintain Inventory Control (to be completed by the Purchasing Department --Inventory)															
38. Inventory control receives receiving report(s).	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
39. Process storeroom stock receiving reports.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
39.1 Enter receiving information into inventory control system.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
39.2 Bring balance on hand up to date.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
39.3 Forward receiving report to purchasing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
40. Receive issued stock requisitions.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
40.1 Enter stock issue information into inventory control system.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

XI. 40. (Continued)	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
40.2 Enter price information to stock requisition as required by the system.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
40.3 Bring balance up to date.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
40.4 Forward stock requisition (charging information) to accounting department for expensing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
XII. Process Vendor Invoices (to be completed by the Purchasing Department--Accounts Payable/ Purchasing/General Inventory)					—										
41. Accounts payable receives information for payment on a daily basis.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
41.1 Receive copies of purchase orders issued if appropriate.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
41.2 Receive invoices from vendors.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
41.3 Receive receiving reports and packing slips.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
41.4 Collate and file receiving report-packing slip combinations with invoice and copy of applicable purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
41.5 Take the following steps if any documents are missing:															
41.51 Maintain suspense file for incomplete accounts payable documents.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
41.511 Notify purchasing if copy of purchase order is missing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

XII. 41. (continued)

		FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
		Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
41.512	Wait for a predetermined period of time if receiving report-packing slip combination is missing, and then notify purchasing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
41.513	Wait for a predetermined period of time if invoice has not arrived and then notify purchasing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
42.	Check vendor invoice against purchase order and receiving report if all reports are in.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
42.1	Check type of item.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
42.2	Check quantity of item.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
42.3	Check price of item.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
42.4	Check delivery charges.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
42.5	Check price extensions.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
43.	For discrepancies in Items 42.1 through 42.5, refer to purchasing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
44.	After resolving the discrepancy purchasing notifies accounts payable of proper action.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
44.1	Purchasing notifies inventory control.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
44.11	Inventory control makes correcting entries to the stock system.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
45.	Accounts payable receives and reviews corrected discrepancy documents returned by purchasing.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
46.	Process invoice for payment when discrepancy has been resolved.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
46.1	OK amount of payment less any authorized discounts.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

		FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
		Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
XII. 46. (continued)																
46.2	Accounts payable approves invoice for payment.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
46.3	Entire packet of material forwarded to payment section for issuance of check.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
XIII.	Maintain Purchasing Records (to be completed by the Purchasing Department)															
47.	Purchasing maintains complete documentation of each purchasing transaction.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.1	Purchasing department files purchasing documents alphabetically by name of vendor and numerically by number of purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.11	To include bid sheets, vendor proposals, warranties, vendor specifications, original requisitions, correspondence, budget justification, etc.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.2	Purchasing maintains file of purchase orders by using departments and purchase order numbers.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.3	Purchasing department enters purchasing information in numerical log book by purchase order number including the following information	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.31	Date of receipt of requisition.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.32	Using department.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.33	Vendor name.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.34	Date of issuance of purchase order.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

XIII. 47. (continued)

		FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
		Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
47.4	Purchasing maintains files of miscellaneous materials and records such as:	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.41	Internal and external correspondence.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.42	Market surveys.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.43	Budget data.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.44	Special projects.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
47.45	Vendor catalogs.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
		1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
XIV.	Disposal of Surplus Materials (to be completed by the Purchasing Department)															
48.	Using department informs purchasing of the availablability of obsolete surplus, or scrap materials within that department.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
49.	Purchasing determines disposition of materials.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
49.1	Use in other departments within the hospital.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
49.2	Trade-in on new equipment.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
49.3	Sell.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

Instructions:
Please read each task and place an "X" in the appropriate box opposite it to show your answer.

XIV. 49. (continued)

	FREQUENCY: How often do you do this task?					SUPERVISION: How much supervision do you get for this task?					DIFFICULTY: How difficult is this task?				
	Daily / Almost Daily	Several times a Week	Several times a Month	Several times a Year	Never / Almost Never	All the time	Most of the Time	Occasionally	Rarely	No Supervision	Routine procedure- No decisions	Several procedures- Minor decisions	Select most Suitable procedure	Establish and/or Modify procedure	Make complex decisions Little precedent
49.4 Scrap.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
49.5 Store for future use.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
50. Purchasing obtains the proper authorization for disposal or transfer of material	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
51. Purchasing negotiates the disposal transaction.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
51.1 Follow special procedures for hazardous materials.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
52. Purchasing completes disposal transaction	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
52.1 Have payment made to hospital in the case of a sale.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
52.2 Provide for trade-in against new equipment.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
52.3 Authorize the release of the material.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
53. Complete and route the proper disposition documents for accounting and purchasing records.	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5

APPENDIX D

PURCHASING QUESTIONNAIRE
(Directed to Administrators)

A. Circle the alternative which you think would provide the better general description of the purchasing structure at your institution:

Centralized

Decentralized

B. Indicate by circling the appropriate number which of the following is the major purchasing agency for your institution:

1--A department or agency of a larger administrative unit within which your institution is contained

2--A purchasing department within your institution, or a designated member of the institution's staff

3--An outside purchasing agency with which your institution has a contract

4--The individual using departments within your institution

5--Other (describe) _____

If purchasing also is done by another agency in addition to the one considered to be the major agency, write the number that designates this other agency in this space: _____

If your institution has a purchasing department or agent, indicate by circling the appropriate numbers if the purchasing department includes one or more persons in the following categories:

1--Purchasing agent/purchasing director

2--Assistant/buyer

3--Secretary/typist-clerk

4--Storeroom manager/storekeeper/storeroom clerk/inventory clerk

5--Receiving clerk/shipping clerk/invoice clerk

If your institution has a purchasing department or agent, indicate by circling the appropriate numbers which, if any, of the following functional areas constitute separate divisions within the purchasing department with specific personnel other than the purchasing agent responsible for activities within the area:

1--Storage and inventory control

2--Receiving and shipping

3--Accounting, final processing of vendor invoices

C. Indicate by circling the appropriate number (or numbers) the person (persons) who makes purchases of materials and supplies at your institution:

1--Administrator

2--A member of the administrator's staff who is designated as a purchasing agent or who is given responsibility for purchasing, but who is not assisted by a purchasing staff

3--A purchasing agent or director who heads a purchasing department that includes additional personnel

4--Storeroom manager

5--Heads of using departments

6--Personnel within using departments who are below the level of department head

7--Other (specify) _____

_____

D. Indicate which of the following alternatives best describes the purchasing for each of the four departments listed below by writing the number of the appropriate alternative in the space opposite the department name:

1--Purchasing usually is done by the purchasing department or agency. Personnel within the using department ordinarily do not place purchase orders, but submit requisitions or requests to the purchasing department.

2--Some purchasing is done by the purchasing department and some is done by the using department.

3--Purchasing for this department (with the possible exception of extraordinary items) usually is done by the using department itself.

____ Dietary Department

____ Housekeeping Department

____ Nursing Department

____ Pharmacy Department

E. Indicate by circling the appropriate number which of the following alternatives best describes the storeroom facilities at your institution:

1--Storeroom facilities are centralized under the management of the purchasing department.

2--Storeroom facilities are centralized, but not under the management of a purchasing department.

3--Storeroom facilities are not centralized; each using department has its own facilities.

F. Indicate by circling the appropriate numbers which of the following alternatives best describes the receiving/shipping facilities at your institution:

1--Receiving/shipping facilities are centralized under the management of the purchasing department.

2--Receiving/shipping facilities are centralized, but not under the management of a purchasing department.

3--Receiving/shipping facilities are not centralized; each using department manages its own receiving and shipping.

G. Indicate by circling the appropriate number (or numbers) which of the following departments completes the processing of vendor invoices:

1--Purchasing department

2--Accounts payable department

3--Using departments

4--Other (specify) _____

H. Circle your answers to each of the following questions:

1--Do you believe that centralization of purchasing is desirable for an institution such as yours?

Yes No

2--Would you like to have purchasing at your institution centralized to a greater degree than it is at present?

Yes No

3--If your institution does not now have a purchasing department, do you plan to establish one; or if your institution has a purchasing department, do you plan to extend its activities to any areas which it does not now cover?

Yes No

Signature of person completing questionnaire _____

Title _____

TC:grk
2-3-70

APPENDIX E

OCCUPATIONAL CATEGORIES AND JOB TITLES

The job position titles held by respondents in each of the eight occupational categories are listed below as they were given by the respondents in item 1.1 of the background information inventory (Appendix C-3.) The U. S. Office of Education (OE) and the U. S. Department of Labor Dictionary of Occupational Titles (DOT) code designations are given where such designations exist for the listed occupational titles, or for ones which are comparable but not specific to the health care field.

1. Purchasing agent OE 04.99; DOT 162.158-102

   Purchasing agent

   Director of purchasing

   Director of procurement

   Assistant to president for purchasing

2. Assistant purchasing agent OE 14.0899; DOT 162.168-026

   Assistant purchasing agent

   Assistant director of purchasing

   Materials manager

   Buyer

3. Storekeeper OE 14.0504; DOT 223-138.026

   Storekeeper

   Storeroom manager

   Head of storeroom

   Chief storekeeper

   Assistant storekeeper

Senior storeroom clerk

Storeroom clerk

4. Administrator OE 14.0899; DOT 162.118-010

Administrator

5. Accountant OE 14.0101; DOT 162.188-010

Accountant

Controller

6. Department head (pharmacy)

Chief pharmacist

Director of pharmacy

Department head (dietary) OE 09.0203; DOT 187.168-066

Executive dietician

Chief dietician

Head dietician

Director of dietary service

Manager of dietary service

Director of food service

Department head (nursing)

Director of nursing service

Department head (housekeeping) OE 09.0205; DOT 187.168-050

Executive housekeeper

Head housekeeper

Director of housekeeping

Department head, laundry OE 17.1602; DOT 361.138-010

Department head (other)

Pathologist

Chief X-ray technician OE 07.0501; DOT 078.368-030

Laboratory supervisor OE 07.02

Building superintendant

Plant manager

Assistant administrator OE 14.0801; DOT 169.168-014

7. Supervisor (dietary) OE 09.0203; DOT 319.138-010

Dietician

Assistant dietician

Dietary supervisor

Food supervisor

Food manager

Kitchen manager DOT 310.138-010

Supervisor (nursing) OE 07.0301; DOT 075.387-014

Head nurse

Supervisor

Supervisor (housekeeping) OE 09.0205; DOT 321.138-010

Housekeeping supervisor

Housekeeping coordinator

Assistant housekeeper

Supervisor (other)

Maintenance supervisor OE 16.0111; DOT 638.281-026

Sanitation supervisor OE 17.0703; DOT 168.287-094

8. Worker

Secretary OE 14.0702; DOT 201.368-014

Pharmacy assistant

Ward clerk DOT 219.388-286

Food steward OE 09.0203; DOT 317.887-010

APPENDIX F

PURCHASING TASK LISTS

Task lists have been constructed for the following occupational categories:

1. Purchasing agent
2. Storekeeper
3. Administrator
4. Accountant
5. Department head

Each task list shows (a) the percentage of respondents in the occupational category who perform each task, and, if appropriate, the percentages of respondents in associated occupational categories who perform the task, (b) the modal frequency of performance of each task (or frequencies if a single mode represents less than half of those who perform the task) and (c) the mean of the task difficulty ratings by the respondents for whom the percentage performance figure are given.

The Basic Task List for each occupation covers functions usually performed by persons in that occupational category that might be included in a curriculum generally appropriate for the occupation. The Supplementary Task Lists cover functions which may or may not be performed, depending upon the policies and practices of specific institutions.

A curriculum developed for purchasing agents would be appropriate also for assistant purchasing agents and for other individuals (e.g., storekeepers at certain institutions) whose job titles are different but whose functional positions are equivalent to that of a purchasing agent. A curriculum developed for department heads would be appropriate also for supervisors.

APPENDIX F-1

PURCHASING AGENT

The principal activities performed by a purchasing agent are the final editing and completion of requisitions, the evaluation and selection of suppliers, and the preparation and filling of purchase orders. In addition, as a user of supplies, a purchasing agent can be expected to determine needs for his own department and to initiate requisitions. He also may assist in the determination of needs and preparation of requisitions for other departments. Most purchasing agents maintain purchasing records and dispose of surplus materials, and most are required to authorize the return of materials to vendors even when they do not participate further in the return of the materials. Final processing of vendor invoices is likely to be included among the responsibilities of a purchasing agent, although at some larger institutions it may be a function performed by an accountant. These activities have been included in the Basic Task List.

The two Supplementary Task Lists cover the areas of receiving and storage respectively, either or both of which may be among the responsibilities of a purchasing agent at particular institutions. A purchasing agent may perform receiving and/or storage functions, or he may exercise some kind of general supervision over one or both of these functions without necessarily being directly involved in their performance. Larger institutions often may have separate departments or divisions for receiving and storage, but at many smaller institutions the purchasing agent himself must perform these functions. Most assistant purchasing agents do not perform either receiving or storage functions, since most institutions which have assistant purchasing agents are larger ones.

BASIC TASK LIST

Identification of needs and preparation of requisitions

I-A. Identify needs for supplies, services and equipment.
I-B. Determine storage locations and maintain stock levels.
II. Prepare standard requisition and forward to purchase and/or stores.
III. Review requisition and forward to purchasing or stores.

Purchasing

IV. Edit requisition and approve for purchase.
V-A. Pre-determine sources of supply.
V-B. Evaluate products of potential suppliers and select qualified potential suppliers.
V-C. Evaluate capabilities of selected potential suppliers.
V-D. Obtain buying information from potential suppliers.
V-E. Complete requisition.
VI. Prepare purchase order.
VII. Check and expedite open purchase orders.
IX-A. Authorize return of materials to vendors.
XIII. Maintain complete purchasing records.

XIV. Dispose of surplus materials.

Processing of invoices

XII-A. Receive vendor invoices and collate them with other documents.
XII-B. Check invoices against purchase orders and receiving reports, and process invoices for payment.

SUPPLEMENTARY TASK LIST 1

Receiving/shipping

VIII-A. Receive and file receiving copies of purchase orders.
VIII-B. Receive materials delivered by vendors.
VIII-C. Inspect materials delivered by vendors.
VIII-D. Deliver materials to storeroom or using departments.
IX-A. Return materials to vendors.
IX-B. Process other outgoing shipments.

SUPPLEMENTARY TASK LIST 2

Storage

X-A. Fill storeroom stock requisitions.
X-B. Service storeroom replacement carts.
XI-A. Process storeroom stock receiving reports.
XI-B. Process storeroom stock requisitions.

PURCHASING AGENT
BASIC TASK LIST

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
I-A Identify needs for supplies, services and equipment.										
1. Participate in the preparation of supplies, service and equipment budget, including make, buy or lease decision and standardization.	46	14	30	X					X	
2. Identify the types of supplies and services required for attainment of the unit's objectives.	54	14	40	X	X				X	
3. Consult with the purchasing/procurement office in establishing appropriate quality and quantity standards.	31	0	30		X					X
I-B. Determine storage locations and maintain stock levels.										
4. Assist in determining storage location and levels in terms of time or usage.	54	14	40	X	X				X	
4.1 unit	31	0	10	X					X	
5. Submit requisition to maintain stock levels.	46	14	30	X	X				X	
6. Process orders to fill unanticipated needs.	50	14	40	X						X
II. Prepare standard requisition.										
7. Complete the standard requisition for purchasing and/or stores.	31	14	30	X	X				X	
7.1 Enter requisitioning unit identification.	31	14	30	X	X			X		
7.2 Enter date on which the requisition was prepared.	31	14	30	X	X			X		
7.3 Enter quantities of the items required.	46	14	30	X					X	
7.4 Enter descriptions of the items required in sufficient detail to identify the products or services.	39	14	30	X					X	
7.5 Enter date on which the non-stock items will be needed.	39	14	30	X						X
7.6 Enter justification and anticipated usage if items are not standardized expendable supplies.	31	14	20	X						X
7.7 Enter name of the requisitioner.	31	14	20	X					X	
8. Forward the purchasing requisition to the approving authority if necessary.	31	14	30	X					X	
III. Review requisition and forward to purchasing or stores.										

PURCHASING AGENT BASIC TASK LIST	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
9. Requisition received by approving authority.	39	0	20	X				X		
10. Recipient determines if he has approval authority.	31	0	20	X				X		
10.1 Determine if requisition is for routine expendable supplies and in usual ordering quantities; check with purchasing if necessary.	39	0	20	X				X		
10.11 Determine if within budget.	23	14	10	X				X		
10.12 Check with requisitioning unit if not satisfied; modify as needed, approve and forward to purchasing.	31	0	20	X					X	
10.13 Approve requisition if satisfied and forward to purchasing or stores.	31	14	20	X				X		
10.2 Forward to superior purchasing authority for approval if purchasing authority does not reside at recipient level.	23	0	20		X	X		X		
10.21 Check with department to justify requisition if necessary.	39	14	20	X	X			X		
10.22 Determine price/cost.	39	14	20	X				X		
10.23 Check to see if item is within budget.	39	14	10	X	X			X		
10.24 Justify to higher authority if appropriate.	39	14	10			X			X	
10.25 Forward to higher approving authority.	31	14	10			X			X	
IV. Edit requisition and approve for purchase.										
11. Purchasing Department receives requisition.	92	71	70	X				X		
12. Edit requisition for:										
12.1 Budgetary information.	62	71	20		X			X		
12.2 Specifications.	92	100	40	X					X	
12.3 Quantity.	92	100	60	X				X		
12.4 Approval authority.	62	86	50			X	X	X		
12.5 Query requisitioner if information is incomplete.	92	100	50	X	X			X		
13. Number requisition if necessary and assign to buyer.	62	71	20	X				X		
14. Value analyze and recommend changes if desirable.	92	100	50		X	X			X	

PURCHASING AGENT BASIC TASK LIST	Percentages Performing Task: Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor decisions	Select suitable procedures
15. Approve for purchase.	92	100	10	X				X		
V.-A Pre-determine sources of supply.										
16. Pre-determine sources	92	100	50	X				X		
16.1 Current contract(s).	85	71	30	X			X		X	
16.2 Small orders.	92	86	60	X					X	
16.3 Emergency purchase.	92	100	50			X		X		
16.4 Should the need be immediate, select a vendor on the basis of past reliability, order the smallest quantity meeting the need and then perform a product evaluation.	69	86	40			X				X
16.5 Traveling purchasing requisition.	31	29	20	X				X		
V.-B Evaluate products of potential suppliers and select qualified potential suppliers.										
17. Determine potential suppliers.	92	86	30	X						X
17.1 Consider current catalogs and reference material including purchasing records.	92	86	50		X	X			X	
17.2 Consult with unit making request if necessary.	100	100	50		X	X			X	
17.21 Evaluation committee develops criteria by which competing products that meet the item specification may be judged.	62	57	20				X			X
17.22 Evaluate the products in terms of criteria.	92	86	40			X				X
17.23 Rate the products and report the information to the buyer.	69	71	40			X	X			X
17.3 Consider vendors with whom a supplier relationship already exists.	92	71	30	X	X				X	
17.4 Confer with other purchasing departments.	69	29	30			X	X		X	
17.5 Consult with local professional organizations.	46	14	10				X		X	
17.6 Select qualified suppliers.	100	86	40	X	X					X
V.-C Evaluate capabilities of selected potential suppliers.										
18. Evaluate selected suppliers where sources need to be determined.	100	86	30	X			X			X
18.1 Technical capability.	61	57	20				X			X

PURCHASING AGENT BASIC TASK LIST	Percentages Performing Task: Purchasing Agent	Asst. Purchasing Agent	Storekeeper	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor decisions	Select suitable procedures
18.2 Financial capability.	39	71	0			X	X		X	
18.3 Management capability.	46	71	10			X	X			X
18.4 Logistic capability.	54	57	20				X		X	
18.5 Capacity capability.	46	71	20			X	X		X	
V.-D Obtain buying information from potential suppliers.										
19. Obtain buying information and samples where sources need to be determined.	100	86	20			X	X		X	
19.1 Use published price lists where prices are fixed by the vendors if feasible.	92	71	40		X	X		X		
19.2 Use competitive bids if the following criteria exist.	85	86	30			X	X		X	
19.21 If specifications are clear to both buyer and seller.	85	57	20			X	X		X	
19.22 If 3 or more potential suppliers are willing to compete.	69	57	20			X	X			X
19.23 If dollar volume is sufficient (above minimum bid policy).	62	57	0			X	X		X	
19.24 If time permits (if time available is sufficient for competitive bidding).	54	57	10				X		X	
19.3 Negotiate if competive bidding and use of price lists are impractical.	62	71	20			X	X			X
V.-E Complete requisition.										
20. Complete the requisition.	85	86	20	X				X		
20.1 Enter date ordered.	69	100	30	X				X		
20.2 Enter order number corresponding to the number on the first available blank purchase order.	62	86	30	X				X		
20.3 Enter quantity ordered if different from that shown in requisition.	77	71	30	X	X			X		
20.4 Enter name and address of vendor from whom the purchase is to be made based on supplier meeting criteria.	69	86	40	X				X		
20.5 Enter price, delivery, packing specifications and method of shipment.	85	71	40	X				X		
20.6 Enter other appropriate specifications (patents, warrantees, etc.).	46	57	20			X	X		X	

PURCHASING AGENT BASIC TASK LIST	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
20.7 Attach the available blank purchase order to the non-stock purchasing requisition and forward to purchase order preparation desk.	46	71	30	X				X		
VI. Prepare purchase order.										
21. Check to see that the information contained on the requisition is sufficient to permit the preparation of a purchase order.	92	100	70	X				X		
21.1 Return requisition and blank purchase order to the buyer for resolution, if information not sufficient.	38	57	50		X	X		X		
21.2 Prepare purchase order.	77	86	40	X				X		
21.21 Enter date of issue.	77	86	50	X				X		
21.22 Enter number if not already entered.	54	43	30	X				X		
21.23 Enter name and address of vendor.	69	86	40	X				X		
21.24 Enter expected date of delivery.	46	71	30	X	X				X	
21.25 Enter quantity.	85	86	40	X				X		
21.26 Enter description.	77	86	40	X				X		
21.27 Enter price.	77	86	40	X				X		
21.28 Enter typed name of buyer.	46	29	40	X				X		
21.29 Enter conditions or terms of the purchase (if applicable or not preprinted).	46	71	30	X					X	
22. Buyer review and sign purchase order.	77	71	40	X				X		
23. Distribute copies of purchase order and requisitions as appropriate.	69	71	40	X				X		
VII. Check and expedite open purchase orders.										
24. Check open purchase orders including incomplete shipments and expedite where necessary.	92	86	50	X	X			X		
25. Check with using department if shipment delayed to determine criticality.	92	86	60	X	X			X		
26. Take appropriate measures.	62	86	50	X	X			X		
IX.-A Return materials to vendors.										
34. Materials to be returned to vendor.	77	57	70			X	X		X	
34.1 Using Department notifies purchasing of goods to be returned to vendor.	85	57	80			X	X		X	

PURCHASING AGENT BASIC TASK LIST	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
34.2 Purchasing verfies that return is authorized.	85	43	70			X	X	X		
34.3 Purchasing determines appropriate disposition.	77	43	60			X	X	X		
34.4 Purchasing prepares covering documents.	85	43	60			X	X	X		
XII.-A Receive vendor invoices and collate them with other documents.										
41. Accounts payable receives information for payment on a daily basis.	77	14	20	X				X		
41.1 Receive copies of purchase orders issued if appropriate.	69	29	20	X				X		
41.2 Receive invoices from vendors.	77	43	20	X				X		
41.3 Receive receiving reports and packing slips.	69	29	20	X				X		
41.4 Collate and file receiving report packing slip combinations with invoice and copy of applicable purchase order.	46	29	20	X				X		
41.5 Take the following steps if any documents are missing:										
41.51 Maintain suspense file for incomplete accounts payable documents.	62	43	20	X				X		
41.511 Notify purchasing if copy of purchase order is missing.	62	29	30	X			X	X		
41.512 Wait for a predetermined period of time if receiving report-packing slip combination is missing, and then notify purchasing.	46	29	20			X	X		X	
41.513 Wait for a predetermined period of time if invoice has not arrived and then notify purchasing.	69	14	20			X	X		X	
XII.-B Check vendor invoices against purchase orders and receiving reports, and process invoices for payment.										
42. Check vendor invoice against purchase order and receiving report if all reports are in.	77	43	20	X				X		
42.1 Check type of item.	77	29	20	X				X		
42.2 Check quantity of item.	77	29	20	X				X		
42.3 Check price of item.	85	29	20	X				X		

PURCHASING AGENT BASIC TASK LIST	Percentages Performing Task: Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor decisions	Select suitable procedures
42.4 Check delivery charges.	77	43	10	X				X		
42.5 Check price extensions.	62	14	20	X				X		
43. For discrepancies in Items 42.1 through 42.5, refer to purchasing.	54	14	20	X	X				X	
44. After resolving the discrepancy purchasing notifies accounts payable of proper action.	69	29	20	X	X			X		
44.1 Purchasing notifies inventory control.	38	29	20	X				X		
44.11 Inventory control makes correcting entries to the stock system.	38	43	20	X	X			X		
45. Accounts payable receives and reviews corrected discrepancy documents returned by purchasing.	62	14	20	X	X				X	
46. Process invoice for payment when discrepancy has been resolved.	77	14	20	X	X			X		
46.1 OK amount of payment less any authorized discounts.	69	29	20	X				X		
46.2 Accounts payable approves invoice for payment.	54	14	20	X	X				X	
46.3 Entire packet of material forwarded to payment section for issuance of check.	54	14	20	X	X				X	
XIII. Maintain complete purchasing records.										
47. Purchasing maintains complete documentation of each purchasing transaction.	77	71	20	X				X		
47.1 Purchasing department files purchasing documents alphabetically by name of vendor and numerically by number of purchase order.	77	57	20	X				X		
47.11 To include bid sheets, vendor proposals, warranties, vendor specifications, original requisitions, correspondence, budget justification, etc.	62	43	20	X				X		
47.2 Purchasing maintains file of purchase orders by using departments and purchase order numbers.	62	29	10	X				X		

PURCHASING AGENT BASIC TASK LIST	Percentages Performing Task: Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor decisions	Select suitable procedures
47.3 Purchasing department enters purchasing information in numerical log book by purchase order number including the following information.	46	43	10	X				X		
47.31 Date of receipt of requisition.	69	43	10	X				X		
47.32 Using department.	69	43	0	X				X		
47.33 Vendor name.	69	43	10	X				X		
47.34 Date of issuance of purchase order.	69	43	10	X				X		
47.4 Purchasing maintains files of miscellaneous materials and records such as:	46	57	10	X				X		
47.41 Internal and external correspondence.	69	43	20	X				X		
47.42 Market surveys.	38	29	10				X		X	
47.43 Budget data.	31	43	10				X	X		
47.44 Special projects.	46	43	10				X		X	
47.45 Vendor catalogs.	77	43	20	X	X			X		
XIV. Dispose of surplus material.										
48. Using department informs purchasing of the availability of obsolete surplus, or scrap materials within that department.	46	29	20				X		X	
49. Purchasing determines disposition of materials.	62	29	20				X		X	
49.1 Use in other departments within the hospital.	46	29	20				X		X	
49.2 Trade-in on new equipment.	38	43	20				X		X	
49.3 Sell	54	29	20				X		X	
49.4 Scrap.	54	29	10				X		X	
49.5 Store for future use.	62	43	10				X	X		
50. Purchasing obtains the proper authorization for disposal or transfer of material.	46	43	20				X		X	
51. Purchasing negotiates the disposal transaction.	46	29	20				X		X	
51.1 Follow special procedure for hazardous materials.	31	29	20				X		X	

PURCHASING AGENT BASIC TASK LIST	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
52. Purchasing completes disposal transaction.	46	29	20			X		X		
52.1 Have payment made to hospital in the case of a sale.	62	29	20			X		X		
52.2 Provide for trade-in against new equipment.	54	43	20			X		X		
52.3 Authorize the release of the material.	54	29	20			X		X		
53. Complete and route the proper disposition documents for accounting and purchasing records.	46	29	30			X		X		

PURCHASING AGENT
Supplementary Task List 1

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
VIII.-A Receive and file receiving copies of purchase orders.										
27. Receive and file receiving copy of purchase order.	69	43	80	X				X		
27.1 File receiving copy of purchase order in alphabetical file by name of vendor and then by purchase order number.	62	14	60	X				X		
VIII.-B Receive materials delivered by vendors.										
28. When carrier arrives at loading dock, check carrier's manifest to ascertain proper delivery addressee.	62	92	80	X				X		
28.1 Check with purchasing or other appropriate department(S) if necessary.	46	29	80	X			X			
28.2 Re-direct carrier, if not proper delivery addressee.	54	14	60	X				X		
29. Participate in unloading and check shipment, if proper delivery addressee.	38	29	90	X			X			
29.1 Locate receiving department copy of purchase order applicable to shipment delivery and compare with carrier's manifest.	62	43	80	X			X			
29.2 If in order, participate in unloading containers from carriers vehicle.	31	29	70	X			X			
29.3 Compare number of shipping containers unloaded against carrier's manifest to make certain they agree.	62	43	80	X				X		
29.31 Note shortage, if any, on carrier's receipt which receiving clerk signs.	62	43	70	X				X		
29.4 Inspect shipping containers for external damage.	69	29	80	X				X		
29.41 Any damage found should be inspected by carrier's driver and noted on carrier's receipt which receiving clerk signs.	46	29	70	X				X		
29.5 Receiving clerk dates and signs carrier's receipt relieving carrier of responsibility for loss or damage to materials other than noted on receipt, or concealed damage.	46	29	80	X				X		

PURCHASING AGENT
SUPPLEMENTARY TASK LIST 1

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a Year	Routine procedure	Minor decisions	Select suitable procedures
VIII.-C Inspect materials delivered by vendors.										
30. Unpack and inspect materials.	62	29	80	X				X		
30.1 Unpack materials and locate vendor's packing slip.	62	29	80	X				X		
30.2 From information on packing slip identify name of vendor and, if indicated, number(s) of purchase order(s) involved.	62	29	80	X				X		
30.3 Check general condition of materials to determine if any damage was incurred during shipment.	62	29	80	X				X		
30.31 Process claim	62	14	60			X		X		
30.4 Check materials received against vendor's packing slip and applicable purchase orders.	62	43	80	X				X		
30.41 Verify that correct items have been shipped.	62	29	80	X				X		
30.411 If necessary, request assistance of requisitioning department.	38	14	60			X		X		
30.42 Verify that correct quantities have been shipped.	62	29	80	X				X		
31. Complete and route receiving report.	46	43	80	X				X		
VIII.-D Deliver materials to storeroom or using department.										
32. Deliver materials to storeroom or to requesting department as shown on purchase order.	62	29	80	X				X		
32.1 Obtain signature of person on receiving report to show materials were delivered.	38	0	70	X				X		
33. Verify services received.	38	0	50	X					X	
33.1 Requisitioning department verifies that services have been satisfactorily performed as requested.	54	0	50	X						X
33.2 Receiving documents are routed to appropriate department for processing.	69	14	50	X						X

PURCHASING AGENT
SUPPLEMENTARY TASK LIST 1

	Percentages Performing Task			Modal Frequency of Performance			Difficulty Level		
	Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
IX.-A Return materials to vendors.										
34. Materials to be returned to vendor.	77	57	70			X	X		X	
34.1 Using Department notifies purchasing of goods to be returned to vendor.	85	57	80			X	X		X	
34.2 Purchasing verifies that return is authorized.	85	43	70			X	X	X		
34.3 Purchasing determines appropriate disposition.	77	43	60			X	X	X		
34.4 Purchasing prepares covering documents.	85	43	60			X	X	X		
34.41 Route documents to appropriate departments.	46	29	60			X	X	X		
34.5 Purchasing advises Using Departments of steps to be taken.	54	57	60			X	X		X	
34.51 Hold materials for further instructions.	62	43	50			X	X		X	
34.52 Route materials to shipping (receiving) with request for return.	62	43	50			X	X	X		
34.6 Shipping (receiving) prepares necessary shipping documents.	54	14	60			X	X	X		
34.7 Shipping (receiving) arranges for pickup as necessary.	62	29	70			X	X		X	
34.8 Carrier provides receipt for pickup of materials.	62	29	70			X	X		X	
34.9 Shipping (receiving) routes documents to appropriate departments.	54	29	50			X	X	X		
IX.-B Process other outgoing shipments.										
35. Other outgoing shipments.	15	14	40		X	X		X		
35.1 Using Department notifies purchasing of goods to be shipped.	54	14	40		X	X		X		
35.2 Purchasing determines appropriate handling.	62	29	60		X	X		X		
35.3 Purchasing prepares covering documents and routes to appropriate departments.	54	29	60		X	X			X	

PURCHASING AGENT
SUPPLEMENTARY TASK LIST 1

		Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
		Purchasing Agent	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
35.4	Purchasing notifies Using Department of steps to take.	46	29	30	X	X			X		
35.41	Hold materials for further instructions.	46	14	50		X	X	X			
35.42	Route to shipping (receiving) with request for shipping.	54	14	40		X	X		X		
35.5	Shipping (receiving) prepares necessary shipping documents.	31	0	60		X	X		X		
35.6	Shipping (receiving) arranges for pickup as necessary.	46	14	60		X	X		X		
35.7	Carrier provides receipt for pickup of materials.	54	14	70		X	X		X		
35.8	Shipping (receiving) routes documents to appropriate departments.	46	0	60	X	X			X		

PURCHASING AGENT

Supplementary Task List 2

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Asst. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
X.-A Fill storeroom stock requisitions.										
36. Storeroom receives stock requisition.	54	29	90	X				X		
36.1 Check requisition	54	29	100	X				X		
36.11 For validity.	54	29	100	X					X	
36.12 For proper authorization.	54	43	100	X					X	
36.2 Fill approved requisition with items from stock.	54	29	100	X				X		
36.3 Indicate on requisition quantities of stock dispensed.	62	29	90	X				X		
36.4 Deliver materials to requesting department as shown on stock requisition.	62	29	100	X				X		
36.41 Obtain signature of authorized person to whom materials were delivered on stock requisition.	38	14	70	X				X		
36.5 Forward stock requisition to inventory control.	46	29	80	X				X		
X.-B Service storeroom replacement carts.										
37. Storeroom services exchange carts.				X						
37.2 Prepare requisition to charge department for what has been used.	62	14	40	X					X	
37.4 Route requisition to inventory control.	31	14	40	X				X		
XI.-A Process storeroom stock receiving reports.										
38. Inventory control receives receiving report(s).	46	43	70	X				X		
39. Process storeroom stock receiving reports.	62	43	70	X				X		
39.1 Enter receiving information into inventory control system.	54	29	80	X				X		
39.2 Bring balance on hand up to date.	62	29	60	X				X		
39.3 Forward receiving report to purchasing.	54	29	70	X					X	

PURCHASING AGENT
Supplementary Task List 2

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Purchasing Agent	Asst. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
XI.-B Process storeroom stock requisitions.										
40. Receive issued stock requisitions.	62	29	60	X				X		
40.1 Enter stock issue information into inventory control system.	54	14	60	X				X		
40.2 Enter price information to stock requisition as required by the system.	38	14	70	X				X		
40.3 Bring balance up to date.	46	43	50	X				X		
40.4 Forward stock requisition (charging information) to accounting department for expensing.	46	14	70	X				X		

APPENDIX F-2

STOREKEEPER

The Basic Task List for storekeepers covers storage and receiving. The principal function performed by a storekeeper is the filling of storeroom stock requisitions. Most storekeepers also process stock receiving reports and stock requisitions for inventory control. Most storekeepers receive, inspect and deliver materials, and many, but not all, return materials to vendors and process other outgoing shipments.

The Supplementary Task List includes certain additional functions in the area of purchasing which may be performed by a storekeeper at some institutions but which probably would not be included among the duties of a storekeeper at most institutions. A few storekeepers also perform most of the other functions that a purchasing agent usually performs, and for these individuals a purchasing agent's curriculum would be more appropriate than a storekeeper's curriculum.

BASIC TASK LIST

Storage

X-A. Fill storeroom stock requisitions.
X-B. Service storeroom replacement carts.
XI-A. Process storeroom stock receiving reports.
XI-B. Process storeroom stock requisitions.

Receiving/Shipping

VIII-A. Receive and file receiving copies of purchase orders.
VIII-B. Receive materials delivered by vendors.
VIII-C. Inspect materials delivered by vendors.
VIII-D. Deliver materials to storeroom or using departments.
IX-A. Return materials to vendors
IX-B. Process other outgoing shipments.

SUPPLEMENTARY TASK LIST

Purchasing

IV. Edit requisition.
V-A. Pre-determine sources of supply.
V-B. Evaluate products of potential suppliers and select qualified potential suppliers.
VI. Prepare purchase order.
VII. Check and expedite open purchase orders.

3

STOREKEEPER - BASIC TASK LIST	Percentage Performing Task	Modal Frequency of Performance				Difficulty Level		
	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
VIII.-A Receive and file receiving copies of purchase orders.								
27. Receive and file receiving copy of purchase order.	80	X				X		
27.1 File receiving copy of purchase order in alphabetical file by name of vendor and then by purchase order number.	60	X				X		
VIII.-B Receive materials delivered by vendors.								
28. When carrier arrives at loading dock, check carrier's manifest to ascertain proper delivery addressee.	80	X				X		
28.1 Check with purchasing or other appropriate department (s) if necessary.	80	X	X			X		
28.2 Re-direct carrier, if not proper delivery addressee.	60		X	X				
29. Participate in unloading and check shipment, if proper delivery addressee.	90	X				X		
29.1 Locate receiving department copy of purchase order applicable to shipment delivery and compare with carrier's manifest.	80	X				X		
29.2 If in order, participate in unloading containers from carrier's vehicle.	70	X				X		
29.3 Compare number of shipping containers unloaded against carrier's manifest to make certain they agree.	80	X				X		
29.31 Note shortage, if any, on carrier's receipt which receiving clerk signs.	70	X				X		
29.4 Inspect shipping containers for external damage.	80	X				X		
29.41 Any damage found should be inspected by carrier's driver and noted on carrier's receipt which receiving clerk signs.	70	X				X		

STOREKEEPER - BASIC TASK LIST	Percentage Performing Task	Modal Frequency of Performance				Difficulty Level		
	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
29.5 Receiving clerk dates and signs carrier's receipt relieving carrier of responsibility for loss or damage to materials other than noted on receipt, or concealed damage.	80	X				X		
VIII.-C Inspect materials delivered by vendors.								
30. Unpack and inspect materials.	80	X				X		
30.1 Unpack materials and locate vendor's packing slip.	80	X				X		
30.2 From information on packing slip identify name of vendor and, if indicated, number(s) of purchase order(s) involved.	80	X				X		
30.3 Check general condition of materials to determine if any damage was incurred during shipment.	80	X				X		
30.31 Process claim.	60				X		X	
30.4 Check materials received against vendor's packing slip and applicable purchase orders.	80	X				X		
30.41 Verify that correct items have been shipped.	80	X				X		
30.411 If necessary, request assistance of requisitioning department.	60			X	X	X		
30.42 Verify that correct quantities have been shipped.	80	X				X		
31. Complete and route receiving report.	80	X				X		
VIII.-D Deliver materials to storeroom or using departments.								
32. Deliver materials to storeroom or to requesting department as shown on purchase order.	80	X				X		
32.1 Obtain signature of person on receiving report to show materials were delivered.	70	X				X		
33. Verify services received.	50	X				X		

STOREKEEPER -
BASIC TASK LIST

	Percentage Performing Task	Storekeeper	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor decisions	Select suitable procedures
33.1 Requisitioning department verifies that services have been satisfactorily performed as requested.	50		X				X		
33.2 Receiving documents are routed to appropriate department for processing.	50		X				X		
IX.-A Return materials to vendors and Outgoing Shipments (to be completed by the Purchasing Department--Receiving/ Shipping).									
34. Materials to be returned to vendor.	70			X	X		X		
34.1 Using Department notifies purchasing of goods to be returned to vendor.	80			X	X		X		
34.2 Purchasing verifies that return is authorized	70			X	X		X		
34.3 Purchasing determines appropriate disposition.	60			X	X		X		
34.4 Purchasing prepares covering documents.	60			X	X		X		
34.41 Route documents to appropriate departments.	60			X	X		X		
34.5 Purchasing advises Using Departments of steps to be taken.	60			X	X		X		
34.51 Hold materials for further instruction.	50			X	X		X		
34.52 Route materials to shipping (receiving) with request for return.	50			X	X		X		
34.6 Shipping (receiving) prepares necessary shipping documents.	60			X	X		X		
34.7 Shipping (receiving) arranges for pickup as necessary.	70			X	X		X		
34.8 Carrier provides receipt for pickup of materials.	70			X	X		X		
34.9 Shipping (receiving) routes documents to appropriate departments.	50			X	X		X		
IX.-B Process other outgoing shipments.									
35. Other outgoing shipments.	40			X	X		X		

STOREKEEPER - BASIC TASK LIST	Percentage Performing Task	Modal Frequency of Performance				Difficulty Level		
	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
35.1 Using Department notifies purchasing of goods to be shipped.	40			X	X	X		
35.2 Purchasing determines appropriate handling.	60			X	X		X	
35.3 Purchasing prepares covering documents and routes to appropriate departments.	60			X	X		X	
35.4 Purchasing notifies Using Department of steps to take.	60			X	X		X	
35.41 Hold materials for further instructions.	50			X	X		X	
35.42 Route to shipping (receiving) with request for shipment.	40			X	X		X	
35.5 Shipping (receiving) prepares necessary shipping documents.	60			X	X		X	
35.6 Shipping (receiving) arranges for pickup as necessary.	60			X	X	X		
35.7 Carrier provides receipt for pickup of materials.	70			X	X	X		
35.8 Shipping (receiving) routes documents to appropriate departments.	60		X	X			X	
X.-A Fill storeroom stock requisitions (to be completed by the Purchasing Department--Storeroom).								
36. Storeroom receives stock requisition.	90	X				X		
36.1 Check requisition.	100	X				X		
36.11 For validity.	100	X				X		
36.12 For proper authorization.	100	X				X		
36.2 Fill approved requisition with items from stock.	100	X				X		
36.3 Indicate on requisition quantities of stock dispensed.	90	X				X		
36.4 Deliver materials to requesting department as shown on stock requisition.	100	X				X		

STOREKEEPER - BASIC TASK LIST	Percentage Performing Task	Modal Frequency of Performance				Difficulty Level		
	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
36.41 Obtain signature of authorized person to whom materials were delivered on stock requisition.	70	X					X	
36.5 Forward stock requisition to inventory control.	80	X				X		
X.-B Service storeroom replacement costs.								
37. Storeroom services exchange carts.								
37.1 Determine what Using Department has taken from replacement cart.	30	X	X				X	
37.2 Prepare requisition to charge department for what has been used.	40	X	X				X	
37.3 Restock cart to quota capacity.	30	X					X	
37.4 Route requisition to inventory control.	40	X	X			X		
XI.-A Process storeroom stock receiving reports.								
38. Inventory control receives receiving report(s).	70	X					X	
39. Process storeroom stock receiving reports.	70	X					X	
39.1 Enter receiving information into inventory control system.	80	X					X	
39.2 Bring balance on hand up to date.	60	X					X	
39.3 Forward receiving report to purchasing.	70	X					X	
XI.-B Process storeroom stock requisitions.								
40. Receive issued stock requisitions.	60	X				X		
40.1 Enter stock issue information into inventory control systems.	60	X					X	
40.3 Bring balance up to date.	50	X					X	
40.4 Forward stock requisition (charging information) to accounting department for expensing.	70	X				X		

STOREKEEPER - SUPPLEMENTARY TASK LIST	Percentage Performing Task	Modal Frequency of Performance				Difficulty Level		
	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine prodedure	Minor decisions	Select suitable procedures
IV. Edit requisition								
11. Purchasing Department receives requisition.	70	X				X		
12. Edit requisition for:								
12.2 Specifications.	40	X				X		
12.3 Quantity.	60	X					X	
12.4 Approval authority.	50	X				X		
12.5 Query requisitioner if information is incomplete.	50	X					X	
14. Value analyze and recommend changes if desirable.	50			X			X	
V.-A Pre-determine sources of supply.								
16. Pre-determine sources.	50	X					X	
16.2 Small orders.	60	X	X			X		
16.3 Emergency purchase.	50			X			X	
16.4 Should the need be immediate, select a vendor on the basis of past reliability, order the smallest quantity meeting the need and then perform a product evaluation.	40				X		X	
VI. Prepare purchase order.								
21. Check to see that the information contained on the requisition is sufficient to permit the preparation of a purchase order.	70	X				X		
21.1 Return requisition and blank purchase order to the buyer for resolution, if information not sufficient.	50		X	X		X		
21.2 Prepare purchase order.	40	X				X		
21.21 Enter date of issue.	50	X				X		
21.22 Enter number if not already entered.	30	X				X		
21.23 Enter name and address of vendor.	40	X				X		
21.24 Enter expected date of delivery.	30			X	X	X		
21.25 Enter quantity.	40	X				X		
21.26 Enter description.	40	X				X		

STOREKEEPER -
SUPPLEMENTARY TASK LIST

	Percentage Performing Task	Storekeeper	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor decisions	Select suitable procedures
21.27 Enter price.	40		X				X		
21.28 Enter typed name of buyer.	40		X				X		
21.29 Enter conditions or terms of the purchase (if applicable or not preprinted).	30				X	X		X	
22. Buyer review and sign purchase order.	40		X					X	
23. Distribute copies of purchase order and requisitions as appropriate.	40		X				X		
VII. Check and expedite open purchase orders.									
24. Check open purchase orders including incomplete shipments and expedite where necessary.	50		X	X				X	
25. Check with using department if shipment delayed to determine criticality.	60		X	X				X	
26. Take appropriate measures.	50			X				X	

APPENDIX F-3

ADMINISTRATOR

At many larger institutions the participation of an administrator in purchasing activities probably does not extend beyond budget preparation and identification of needs. At some institutions, however, he may assist in determining storage locations and may review some requisitions. These functions are included in the Basic Task List as ones which might be performed by an administrator at an institution that has a purchasing department.

Supplementary Task List 1 covers the functions which seem most likely to be performed by an administrator at a small institution, particularly an Extended Care Facility, which does not have a purchasing department. Purchasing at such an institution may be largely decentralized with requisitions and purchase orders being processed by personnel within using-departments, but the administrator may at least edit and approve requisitions, evaluate and select suppliers, and process invoices for payment. Additional functions which may be performed by a few administrators at small institutions are included in Supplementary Task List 2.

BASIC TASK LIST

Identification of needs and review of requisitions

I-A. Identify needs for supplies, services and equipment.
I-B. Determine storage locations and maintain stock levels.
III. Review requisition and forward to purchasing or stores.

SUPPLEMENTARY TASK LIST 1

Purchasing

IV. Edit requisition and approve for purchase.
V-A. Pre-determine sources of supply.
V-B. Evaluate products of potential suppliers and select qualified potential suppliers.
V-C. Evaluate capabilities of selected potential suppliers.
V-D. Obtain buying information from potential suppliers.

Processing of invoices

XII-A. Receive vendor invoices.
XII-B. Check invoices against purchase orders and receiving reports, and process invoices for payment.

SUPPLEMENTARY TASK LIST 2

Purchasing

XIII. Maintain purchasing records.

XIV. Dispose of surplus materials.

Receiving

VIII-C. Inspect materials delivered by vendors.

ADMINISTRATOR BASIC TASK LIST	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Administrator	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
I-A Identify needs for supplies, services and equipment.										
1. Participate in the preparation of supplies, service and equipment budget, including make, buy or lease decision and standardization.	100					X			X	
2. Identify the types of supplies and services required for attainment of the unit's objectives.	75					X		X		
3. Consult with the purchasing/procurement office in establishing appropriate quality and quantity standards.	50				X	X		X		
I-B Determine storage locations.										
4. Assist in determining storage location levels in terms of time or usage.	63					X		X		
4.1 Unit	38					X		X		
4.2 Storeroom.	38					X		X		
III. Review requisition and forward to purchasing or stores.										
9. Requisition received by approving authority.	50				X	X		X		
10. Recipient determines if he has approval authority.	38				X	X		X		
10.1 Determine if requisition is for routine expendable supplies and in usual ordering quantities; check with purchasing if necessary.	38				X			X		
10.11 Determine if within budget.	50				X	X			X	
10.12 Check with requisitioning unit if not satisfied; modify as needed, approve and forward to purchasing.	50				X	X			X	
10.13 Approve requisition if satisfied and forward to purchasing or stores.	50				X	X		X		
10.21 Check with department to justify requisition if necessary.	63					X	X	X		
10.22 Determine price/cost.	88						X			X
10.23 Check to see if item is within budget.	63					X	X	X		
10.24 Justify to higher authority if appropriate.	38						X			X

ADMINISTRATOR BASIC TASK LIST	Percentages Performing Task: Administrator	Ass't. Purchasing Agent	Storekeeper	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor decisions	Select suitable procedures
10.25 Forward to higher approving authority.	25					X			X	
10.32 If approved, forward to purchasing.	25					X		X		

ADMINISTRATOR
SUPPLEMENTARY TASK LIST 1

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Administrator	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
IV. Edit requisition and approve for purchase.										
12. Edit requisition for:										
12.3 Quantity.	38			X				X		
12.4 Approval authority.	25			X		X		X		
12.5 Query requisitioner if information is incomplete.	25				X	X		X		
15. Approve for purchase.	50				X	X		X		
V.-A Pre-determine sources of supply.										
16. Pre-Determine sources.	50			X	X			X		
16.1 Current contracts.	50					X		X		
16.2 Small orders.	25				X	X		X		
16.3 Emergency orders.	50				X	X		X		
16.4 Should the need be immediate, select a vendor on the basis of past reliability, order the smallest quantity meeting the need and then perform a product evaluation.	63					X			X	
V.-B Evaluate products of potential suppliers and select qualified potential suppliers.										
17. Determine potential suppliers.	38				X	X		X		
17.1 Consider current catalogs and reference material including purchasing records.	63					X		X		
17.2 Consult with unit making request if necessary.	38				X	X		X		
17.22 Evaluate the products in terms of criteria.	25					X			X	
17.3 Consider vendors with whom a supplier relationship already exists.	63				X				X	
17.6 Select qualified suppliers.	63					X			X	
V.-C Evaluate capabilities of selected potential suppliers.										
18. Evaluate selected suppliers where sources need to be determined.	38					X			X	
18.2 Financial capability.	25					X			X	
18.3 Management capability.	25					X			X	

ADMINISTRATOR
SUPPLEMENTARY TASK LIST 1

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
		Administrator	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
V.-D Obtain buying information from potential suppliers.											
19. Obtain buying information and samples where sources need to be determined.	38						X		X		
19.1 Use published price lists where prices are fixed by the vendors if feasible.	50					X	X		X		
19.2 Use competitive bids if the following criteria exist.	50						X		X		
19.21. If specifications are clear to both buyer and seller.	25					X	X		X		
19.22 If 3 or more potential suppliers are willing to compete.	25					X	X		X		
19.3 Negotiate if competive bidding and use of price lists are impractical.	38						X			X	
XII.-A Receive vendor invoices.											
41. Accounts payable receives information for payment on a daily basis.	38			X				X			
41.2 Receive invoices from vendors.	50			X	X				X		
41.3 Receive receiving reports and packing slips.	50			X				X			
XII.-B Check invoices against purchase orders and receiving reports, and process invoices for payment.											
42. Check vendor invoice against purchase order and receiving report if all reports are in.	50				X					X	
42.1 Check type of item.	38				X					X	
42.2 Check quantity of item.	38				X					X	
42.3 Check price of item.	50				X				X		
42.4 Check delivery charges.	50				X				X		
42.5 Check price extensions.	25				X					X	
43. For discrepancies in Items 42.1 through 42.5, refer to purchasing.	25				X	X			X		
44. After resolving the discrepancy purchasing notifies accounts payalbe of proper action.	38				X			X			
45. Accounts payable receives and reviews corrected discrepancy documents returned by purchasing.	38				X			X			

ADMINISTRATOR
SUPPLEMENTARY TASK LIST 1

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Administrator	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
46. Process invoice for payment when discrepancy has been resolved.	50			X	X		X			
46.1 OK amount of payment less any authorized discounts.	50			X			X			
46.2 Accounts payable approves invoice for payment.	50			X			X			
46.3 Entire packet of material forwarded to payment section for issuance of check.	38				X			X		

ADMINISTRATOR
SUPPLEMENTARY TASK LIST 2

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Administrator	Ass't. Purchasing Agent	Storekeeper	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
VIII.-C Inspect materials delivered by vendors.										
30.3 Check general condition of materials to determine if any damage was incurred during shipment.	25			X		X		X		
30.31 Process claim.	38					X		X		
30.41 Verify that correct items have been shipped.	25			X		X		X		
30.42 Verify that correct quantities have been shipped.	25			X		X		X		
XIII. Maintain complete purchasing records.										
47.4 Purchasing maintains files of miscellaneous materials and records such as:	25				X	X		X		
47.41 Internal and external correspondence.	25					X			X	
47.42 Market surveys.	25					X			X	
47.43 Budget data.	25					X			X	
47.44 Special projects.	25					X		X		
47.45 Vendor catalogs.	25					X		X		
XIV. Dispose of surplus materials.										
48. Using department informs purchasing of the availability of obsolete surplus, or scrap materials within that department.	25					X		X		
49. Purchasing determines disposition of materials.	25					X			X	
49.2 Trade-in on new equipment.	25					X			X	
49.3 Sell.	38					X				X
49.5 Store for future use.	25					X		X		
52.2 Provide for trade-in against new equipment.	25					X			X	
53. Complete and route the proper disposition documents for accounting and purchasing records.	25					X				X

APPENDIX F-4

ACCOUNTANT

The principal function in the field of purchasing that an accountant performs is the final processing of vendor invoices. A curriculum suitable for most accountants probably would not need to cover any areas beyond those included in the Basic Task List below. Some accountants, however, occasionally participate in the determination of needs and process orders to fill unanticipated needs. These tasks, therefore, have been included here in a Supplementary Task List for accountants.

BASIC TASK LIST

Processing of invoices

XII-A. Receive vendor invoices and collate them with other documents.
XII-B. Check invoices against purchase orders and receiving reports, and process invoices for payment.

SUPPLEMENTARY TASK LIST

Identification of needs

I-A. Identify needs for supplies, services and equipment.
I-B. Determine storage locations and maintain stock levels.

ACCOUNTANT
BASIC TASK LIST

	Percentages Performing Task		Modal Frequency of Performance				Difficulty Level		
	Accountant		Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor decisions	Select suitable procedures
XII.-A Receive vendor invoices and collate them with other documents.									
41. Accounts payable receives information for payment on a daily basis.	75		X				X		
41.1 Receive copies of purchase orders issued if appropriate.	75		X				X		
41.2 Receive invoices from vendors.	75		X				X		
41.3 Receive receiving reports and packing slips.	75		X				X		
41.4 Collate and file receiving report-packing slip combinations with invoice and copy of applicable purchase order.	75		X				X		
41.51 Maintain suspense file for incomplete accounts payable documents.	75			X				X	
41.511 Notify purchasing if copy of purchase order is missing.	75		X				X		
41.512 Wait for a predetermined period of time if receiving report-packing slip combination is missing, and then notify purchasing.	75			X				X	
41.513 Wait for a predetermined period of time if invoice has not arrived and then notify purchasing.	75		X					X	
XII.-B Check invoices against purchase orders and receiving reports, and process invoices for payment.									
42. Check vendor invoice against purchase order and receiving report if all reports are in.	75		X					X	
42.1 Check type of item.	75		X					X	
42.2 Check quantity of item.	75		X					X	
42.3 Check price of item.	75		X					X	
42.4 Check delivery charges.	50		X					X	
42.5 Check price extensions.	75		X					X	
43. For discrepancies in Items 42.1 through 42.5, refer to purchasing.	50		X		X			X	
44. After resolving the discrepancy purchasing notifies accounts payable of proper action.	50				X	X		X	

ACCOUNTANT BASIC TASK LIST	Percentages Performing Task: Accountant	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor decisions	Select suitable procedures
44.1 Purchasing notifies inventory control.	50		X		X		X	
44.11 Inventory control makes correcting entries to the stock system.	50		X		X		X	
45. Accounts payable receives and reviews corrected discrepancy documents returned by purchasing.	75	X	X					X
46. Process invoice for payment when discrepancy has been resolved.	75	X	X				X	
46.1 OK amount of payment less any authorized discounts.	75	X					X	
46.3 Entire packet of material forwarded to payment section for issuance of check.	75	X					X	

ACCOUNTANT

SUPPLEMENTARY TASK LIST

	Percentages Performing Task	Modal Frequency of Performance				Difficulty Level		
	Accountant	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
I.-A Identify needs for supplies, services and equipment.								
1. Participate in the preparation of supplies, service and equipment budget, including make, buy or lease decision and standardization.	50			X				X
2. Identify the types of supplies and services required for attainment of the unit's objectives.	50			X			X	
I.-B Determine storage locations and maintain stock levels.								
6. Process orders to fill unanticipated needs.	50		X					X

APPENDIX F-5

DEPARTMENT HEAD

A curriculum appropriate for a department head or a first-line supervisor might cover only the Basic Task List shown below or the Basic Task List plus one or more of the Supplementary Task Lists. The Basic Task List includes the functions that a department head may be expected to perform regardless of whether purchasing for his department is centralized or decentralized. Many department heads have no further responsibilities in the field of purchasing. The heads of pharmacy and dietary departments, however, often do some, or even most, of the purchasing for their departments even at institutions where purchasing for other departments is done by a centralized purchasing department.

The functions included in Supplementary Task List 1 are ones which are performed by the heads of departments for which purchasing is decentralized, and also by some heads of departments for which other purchasing functions are centralized. Supplementary Task List 2 includes the additional functions which would be performed by the head of a department for which purchasing is mainly or wholly decentralized, but which would not be performed by all of those department heads who perform the functions included in Supplementary Task List 1.

Supplementary Task Lists 3 and 4 cover the areas of receiving and storage respectively. The functions included in these lists, with the exception of the inspection of materials delivered by vendors (VIII-C), which is included also in Supplementary Task List 1, are performed by relatively few department heads. It is possible for either receiving or storage to be centralized or decentralized independently, whether or not purchasing for a department is centralized. Therefore, curriculum dealing with one or the other of these areas might be appropriate for some department heads who perform purchasing functions and for some who do not.

The only purchasing function that a non-supervisory worker normally performs is the preparation of requisitions for submission to purchasing or stores (II).

BASIC TASK LIST

Identification of needs and preparation of requisitions.

I-A. Identify needs for supplies, services and equipment.
I-B. Determine storage locations and maintain stock levels.
II. Prepare standard requisition for purchasing and/or stores.
III. Review requisition and approve for purchase.

SUPPLEMENTARY TASK LIST 1

Purchasing

V-A. Pre-determine sources of supply.

V-B. Evaluate products of potential suppliers and select qualified potential suppliers.
V-C. Evaluate capabilities of selected potential suppliers.
V-D. Obtain buying information from potential suppliers.

Receiving

VIII-C. Inspect materials delivered by vendors.

SUPPLEMENTARY TASK LIST 2

Purchasing

IV. Edit requisition and approve for purchase.
V-E. Complete requisition.
VI. Prepare purchase order.
VII. Check and expedite open purchase orders.
XIII. Maintain complete purchasing records.
XIV. Dispose of surplus materials.

Processing of invoices

XII-A. Receive vendor invoices.
XII-B. Check invoices against purchase orders and receiving reports, and process invoices for payment.

SUPPLEMENTARY TASK LIST 3

Receiving/shipping

VIII-A. Receive and file receiving copies of purchase orders.
VIII-B. Receive materials delivered by vendors.
VIII-C. Inspect materials delivered by vendors.
VIII-D. Deliver materials to storeroom or using departments.
IX-A. Return materials to vendors.

SUPPLEMENTARY TASK LIST 4

Storage

X-A. Fill storeroom stock requisitions.
X-B. Service storeroom replacement carts.
XI-A. Process storeroom stock receiving reports.
XI-B. Process storeroom stock requisitions.

Department Head - Basic Task List	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
I.-A Identify needs for supplies, services and equipment (to be completed by the Using Department).										
1. Participate in the preparation of supplies, service and equipment budget, including make, buy or lease decision and standardization.	78	60	0			X	X			X
2. Identify the types of supplies and services required for attainment of the unit's objectives.	78	81	33	X	X					X
3. Consult with the purchasing/procurement office in establishing appropriate quality and quantity standards.	71	65	17		X	X			X	
I.-B Determine storage locations and maintain stock levels.										
4. Assist in determining storage location and levels in terms of time or usage.	76	76	17	X	X				X	
4.1 Unit.	49	65	0	X	X				X	
4.2 Storeroom.	42	43	17	X	X				X	
5. Submit requisition to maintain stock levels.	78	70	33		X	X			X	
6. Process orders to fill unanticipated needs.	71	62	17		X	X				X
II. Prepare standard requisition for purchasing and/or stores.										
7. Complete the standard requisition for purchasing and/or stores.	71	78	83		X	X			X	
7.1 Enter requisitioning unit identification.	63	59	67		X	X		X		
7.2 Enter date on which the requisition was prepared.	71	76	83		X	X		X		
7.3 Enter quantities of the items required.	78	89	67		X	X			X	
7.4 Enter descriptions of the items required in sufficient detail to identify the products or services.	71	81	83		X	X			X	
7.5 Enter date on which the non-stock items will be needed.	49	62	33		X	X			X	
7.6 Enter justification and anticipated usage if items are not standardized expendable supplies.	44	43	17			X	X	X		

Department Head - Basic Task List	Percentages Performing Task: Department Head	Supervisor	Worker	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor Decisions	Select suitable procedure
7.7 Enter name of the requisitioner.	59	65	83		X	X		X		
8. Forward the purchasing requisition to the approving authority if necessary.	66	76	67		X	X			X	
III. Review requisition and forward to purchasing or stores.										
9. Requisition received by approving authority.	54	51	50		X	X			X	
10. Recipient determines if he has approval authority.	37	32	33		X	X			X	
10.1 Determine if requisition is for routine expendable supplies and in usual ordering quantities; check with purchasing if necessary.	42	46	33		X	X			X	
10.11 Determine if within budget.	37	46	0			X	X		X	
10.12 Check with requisitioning unit if not satisfied; modify as needed, approve and forward to purchasing.	34	33	33		X	X			X	
10.13 Approve requisition if satisfied and forward to purchasing or stores.	44	51	33		X	X			X	
10.2 Forward to superior purchasing authority for approval if purchasing authority does not reside at recipient level.	24	22	50			X	X		X	
10.21 Check with department to justify requisition if necessary.	49	38	0			X	X		X	
10.22 Determine price/cost.	49	41	17		X	X				X
10.23 Check to see if item is within budget.	42	49	0			X	X			X
10.24 Justify to higher authority if appropriate.	39	38	0				X			X
10.25 Forward to higher approving authority.	37	30	33			X	X			X
10.3 Approving authority considers approval.	42	30	17				X			X
10.31 If disapproved, reject, or return to sender for reconsideration.	27	19	17				X			X
10.32 If approved, forward to purchasing.	46	35	33			X	X		X	

Department Head -
SUPPLEMENTARY TASK LIST 1

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
V.-A Pre-determine sources of supply.										
16. Pre-determine sources.	37	24	0			X	X			X
16.1 Current contracts.	29	16	0			X	X			X
16.2 Small orders.	46	27	0	X	X				X	
16.3 Emergency purchase.	39	14	0			X	X		X	
16.4 Should the need be immediate, select a vendor on the basis of past reliability, order the smallest quantity meeting the need and then perform a product evaluation.	42	14	0			X	X		X	
V.-B Evaluate products of potential suppliers and select qualified potential suppliers.										
17. Determine potential suppliers.	39	16	0			X	X			X
17.1 Consider current catalogs and reference material including purchasing records.	46	24	0			X	X		X	
17.2 Consult with unit making request if necessary.	32	14	0			X	X		X	
17.21 Evaluation committee develops criteria by which competing products that meet the item specification may be judged.	17	11	0				X		X	
17.22 Evaluate the products in terms of criteria.	29	16	0			X	X		X	
17.23 Rate the products and report the information to the buyer.	34	19	0				X			X
17.3 Consider vendors with whom a supplier relationship already exists.	46	19	0			X	X		X	
17.4 Confer with other purchasing departments.	27	19	0			X	X		X	
17.5 Consult with local professional organizations.	27	11	0				X		X	
17.6 Select qualified suppliers.	46	16	0			X	X		X	
V.-C Evaluate capabilities of selected potential suppliers.										
18. Evaluate selected suppliers where sources need to be determined.	46	19	0			X	X		X	
18.1 Technical capability.	29	16	0			X	X		X	
18.2 Financial capability.	22	22	0			X	X		X	
18.3 Management capability.	24	22	0			X	X		X	

Department Head - SUPPLEMENTARY TASK LIST 1	Percentages Performing Task: Department Head	Supervisor	Worker	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor Decisions	Select suitable procedure
18.4 Logistic capability.	15	16	0			X	X		X	
18.5 Capacity capability.	22	14	0			X	X		X	
V.-D Obtain buying information from potential suppliers.										
19. Obtain buying information and samples where sources need to be determined.	44	35	0				X		X	
19.1 Use published price lists where prices are fixed by the vendors if feasible.	44	32	0			X	X		X	
19.2 Use competitive bids if the following criteria exist.	34	14	0				X		X	
19.21 If specifications are clear to both buyer and seller.	34	16	0				X		X	
19.22 If 3 or more potential suppliers are willing to compete.	24	14	0				X	X		
19.23 If dollar volume is sufficient (above minimum bid policy).	17	14	0				X		X	
19.24 If time permits (if time available is sufficient for competitive bidding).	22	11	0				X		X	
19.3 Negotiate if competitive bidding and use of price lists are impractical.	27	11	0				X		X	
VIII.-C Inspect materials delivered by vendors.										
30. Unpack and inspect materials.	42	24	33	X	X				X	
30.1 Unpack materials and locate vendor's packing slip.	34	22	17	X	X			X		
30.2 From information on packing slip identify name of vendor and if indicated, number (s) of purchase order(s) involved.	27	22	0	X	X			X		
30.3 Check general condition of materials to determine if any damage was incurred during shipment.	37	27	33	X	X				X	
30.31 Process claim.	20	16	0			X	X	X		
30.4 Check materials received against vendor's packing slip and applicable purchase orders.	27	30	33	X	X				X	

Department Head -
SUPPLEMENTARY TASK LIST 1

		Percentages Performing Task			Modal Frequency of Performance					Difficulty Level		
		Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
30.41	Verify that correct items have been shipped.	44	33	33	X	X			X		
30.411	If necessary, request assistance of requisitioning department.	15	5	0			X		X		
30.42	Verify that correct quantities have been shipped.	42	33	17	X	X			X		
31.	Complete and route receiving report.	15	22	17	X	X				X	

Department Head -
SUPPLEMENTARY TASK LIST 2

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
IV. Edit requisition and approve for purchase.										
11. Purchasing Department receives requisition.	17	19	17		X	X			X	
12. Edit requisition for:										
12.1 Budgetary information.	20	19	17			X	X		X	
12.2 Specifications.	24	22	17			X	X		X	
12.3 Quantity.	27	24	17			X	X		X	
12.4 Approval authority.	17	22	17			X	X		X	
12.5 Query requisitioner if information is incomplete.	17	16	17	X	X			X		
13. Number requisition if necessary and assign to buyer.	12	16	17		X				X	
14. Value analyze and recommend changes if desirable.	27	16	17			X	X			X
15. Approve for purchase.	27	19	17	X	X				X	
V.-E Complete requisition.										
20. Complete requisition.	24	19	0	X	X				X	
20.1 Enter date ordered.	34	19	0		X	X		X		
20.2 Enter order number corresponding to the number on the first available blank purchase order.	22	19	0	X	X			X		
20.3 Enter quantity ordered if different from that shown in requisition.	17	19	0		X	X			X	
20.4 Enter name and address of vendor from whom the purchase is to be made based on supplier meeting criteria.	27	22	0		X	X		X		
20.5 Enter price, delivery, packing specifications and method of shipment.	15	14	0	X	X				X	
20.6 Enter other appropriate specifications (patents, warrantees etc.).	12	14	0			X	X		X	
20.7 Attach the available blank purchase order to the non-stock purchasing requisition and forward to purchase order preparation desk.	12	11	0			X	X	X		

Department Head -
SUPPLEMENTARY TASK LIST 2

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
VI. Prepare purchase order.										
21. Check to see that the information contained on the requisition is sufficient to permit the preparation of a purchase order.	22	19	17	X	X				X	
21.1 Return requisition and blank purchase order to the buyer for resolution, if information not sufficient.	12	14	0			X	X		X	
21.2 Prepare purchase order.	29	27	17	X	X				X	
21.21 Enter date of issue.	27	19	17	X	X				X	
21.22 Enter number if not already entered.	22	16	0		X	X			X	
21.23 Enter name and address of vendor.	32	24	17	X	X				X	
21.24 Enter expected date of delivery.	15	14	17		X	X			X	
21.25 Enter quantity.	32	27	0		X	X			X	
21.26 Enter description	24	27	17	X	X				X	
21.27 Enter price.	22	22	17	X	X			X		
21.28 Enter typed name of buyer.	12	16	0			X	X	X		
21.29 Enter conditions or terms of the purchase (if applicable or not pre-printed).	10	14	0			X	X	X		
22. Buyer review and sign purchase order.	24	19	17	X	X			X		
23. Distribute copies of purchase order and requisitions as appropriate.	22	16	17	X	X			X		
VII. Check and expedite open purchase orders.										
24. Check open purchase orders including incomplete shipments and expedite where necessary.	27	24	17		X	X			X	
25. Check with using department if shipment delayed to determine criticality.	19	19	17			X	X		X	
26. Take appropriate measures.	24	14	17			X			X	
XII.-A Receive vendor invoices and collate them with other documents.										
41. Accounts payable receives information for payment on a daily basis.	12	14	17		X			X		
41.1 Receive copies of purchase orders issued if appropriate.	10	19	17		X	X		X		

Department Head - SUPPLEMENTARY TASK LIST 2	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
41.2 Receive invoices from vendors.	27	22	17		X	X		X		
41.3 Receive receiving reports and packing slips.	15	14	17	X	X			X		
41.4 Collate and file receiving report/packing slip combinations with invoice and copy of applicable purchase order.	10	14	17	X	X				X	
41.5 Take the following steps if any documents are missing:										
41.51 Maintain suspense file for incomplete accounts payable documents.	7	14	0			X	X		X	
41.511 Notify purchasing if copy of purchase order is missing.	10	14	0			X	X	X		
41.512 Wait for a predetermined period of time if receiving report/packing slip combination is missing, and then notify purchasing.	7	5	0		X	X			X	
41.513 Wait for a pre-determined period of time if invoice has not arrived and then notify purchasing.	7	8	0			X	X		X	
XII.-B Check invoices against purchase orders and receiving reports, and process invoices for payment.										
42. Check vendor invoice against purchase order and receiving report if all reports are in.	24	14	17		X	X		X		
42.1 Check type of item.	29	24	17		X	X			X	
42.2 Check quantity of item.	32	29	17		X	X			X	
42.3 Check price of item.	34	22	17		X	X			X	
42.4 Check delivery charges.	17	16	0		X	X			X	
42.5 Check price extensions.	24	16	17		X	X			X	
43. For discrepancies in Items 42.1 through 42.5, refer to purchasing.	15	11	17		X	X			X	
44. After resolving the discrepancy purchasing notifies accounts payable of proper action.	17	16	0			X	X		X	
44.1 Purchasing notifies inventory control.	2	14	0			X	X		X	

Department Head -
SUPPLEMENTARY TASK LIST 2

	Percentages Performing Task			Modal Frequency of Performance			Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
44.11 Inventory control makes correcting entries to the stock system.	2	14	0			X	X		X	
45. Accounts payable receives and reviews corrected discrepancy documents returned by purchasing.	15	14	0			X	X		X	
46. Process invoice for payment when discrepancy has been resolved.	20	14	0			X		X		
46.1 OK amount of payment less any authorized discounts.	22	14	0			X	X		X	
46.2 Accounts payable approves invoice for payment.	22	14	0			X		X		
46.3 Entire packet of material forwarded to payment section for issuance of check.	15	14	0		X		X	X		
XIII. Maintain complete purchasing records.										
47. Purchasing maintains complete documentation of each purchasing transaction.	15	11	17	X	X				X	
47.1 Purchasing department files purchasing documents alphabetically by name of vendor and numerically by number of purchase order.	15	16	17	X	X			X		
47.11 To include bid sheets, vendor proposals, warranties, vendor specifications, original requisitions, correspondence, budget justification, etc.	10	11	17		X		X	X		
47.2 Purchasing maintains file of purchase orders by using departments and purchase order numbers.	12	8	17	X	X			X		
47.3 Purchasing department enters purchasing information in numerical log book by purchase order number including the following information:	10	14	0		X	X		X		
47.31 Date of receipt of requisition.	12	14	0		X	X			X	
47.32 Using department.	12	16	0		X	X		X		
47.33 Vendor name.	12	19	0		X	X		X		
47.34 Date of issuance of purchase urder.	12	19	0		X	X		X		

Department Head -
SUPPLEMENTARY TASK LIST 2

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
47.4 Purchasing maintains files of miscellaneous materials and records such as:	15	8	0			X	X	X		
47.41 Internal and external correspondence.	17	16	17			X	X		X	
47.42 Market surveys.	12	8	17			X	X	X		
47.43 Budget data.	15	14	17			X	X	X		
47.44 Special projects.	20	14	17			X	X		X	
47.45 Vendor catalogs.	22	14	17			X	X	X		
XIV. Dispose of surplus materials.										
48. Using department informs purchasing of the availability of obsolete surplus or scrap materials within that department.	15	8	0			X	X		X	
49. Purchasing determines disposition of materials.	17	8	0			X	X		X	
49.1 Use in other departments within the hospital.	17	5	0			X	X		X	
49.2 Trade-in on new equipment.	17	3	0				X	X		
49.3 Sell.	12	3	0				X	X		
49.4 Scrap.	15	5	0				X		X	
49.5 Store for future use.	15	8	0				X		X	
50. Purchasing obtains the proper authorization for disposal or transfer of material.	15	8	0			X	X	X		
51. Purchasing negotiates the disposal transaction.	12	5	0				X	X		
51.1 Follow special procedures for hazardous materials.	12	11	0	X	X					X
52. Purchasing completes disposal transaction.	12	5	0			X	X	X		
52.1 Have payment made to hospital in the case of a sale.	7	3	0			X		X		
52.2 Provide for trade-in against new equipment.	7	3	0			X	X	X		
52.3 Authorize the release of the material.	5	5	0			X		X		
53. Complete and route the proper disposition documents for accounting and purchasing records.	10	5	0		X	X		X		

Department Head - SUPPLEMENTARY TASK LIST 3	Percentages Performing Task: Department Head	Supervisor	Worker	Modal Frequency of Performance: Daily	Several times a week	Several times a month	Several times a year	Difficulty Level: Routine procedure	Minor Decisions	Select suitable procedure
VIII.-A Receive and file receiving copies of purchase orders.										
27. Receive and file receiving copy of purchase order.	32	24	33	X	X			X		
27.1 File receiving copy of purchase order in alphabetical file by name of vendor and then by purchase order number.	12	14	33	X	X			X		
VIII.-B Receive materials delivered by vendors.										
28. When carrier arrives at loading dock, check carrier's manifest to ascertain proper delivery addressee.	20	19	17		X	X		X		
28.1 Check with purchasing or other appropriate department (s) if necessary.	15	14	0		X	X		X		
28.2 Re-Direct Carrier, if not proper delivery addressee.	17	14	0			X	X	X		
29. Participate in unloading and check shipment, if proper delivery addressee.	25	16	17		X	X		X		
29.1 Locate receiving department copy of purchase order applicable to shipment delivery and compare with carrier's manifest.	12	22	17		X	X		X		
29.2 If in order, participate in unloading containers from carriers vehicle.	10	8	0			X		X		
29.3 Compare number of shipping containers unloaded against carrier's manifest to make certain they agree.	22	24	17		X	X		X		
29.31 Note shortage, if any, on carrier's receipt which receiving clerk signs.	24	27	0		X	X		X		
29.4 Inspect shipping containers for external damage.	32	24	17		X	X		X		
29.41 Any damage found should be inspected by carrier's driver and noted on carrier's receipt which receiving clerk signs.	24	22	17		X	X		X		

Department Head -
SUPPLEMENTARY TASK LIST 3

	Percentages Performing Task			Modal Frequency of Performance				Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
29.5 Receiving clerk dates and signs carrier's receipt relieving carrier of responsibility for loss or damage to materials other than noted on receipt, or concealed damage.	24	24	17	X	X			X		
VIII.-D Deliver materials to storeroom or using departments.										
32. Deliver materials to storeroom or to requesting department as shown on purchase order.	27	16	0		X	X		X		
32.1 Obtain signature of person on receiving report to show materials were delivered.	20	19	0	X	X			X		
33. Verify services received.	24	19	0		X	X		X		
33.1 Requisitioning department verifies that services have been satisfactorily performed as requested.	19	14	0		X	X		X		
33.2 Receiving documents are routed to appropriate department for processing.	20	14	0		X	X			X	
IX.-A Return materials to vendors.										
34. Materials to be returned to vendor.	27	16	0				X		X	
34.1 Using Department notifies purchasing of goods to be returned to vendor.	20	16	0			X	X		X	
34.2 Purchasing verifies that return is authorized.	12	11	0			X	X	X		
34.3 Purchasing determines appropriate disposition.	15	8	0			X	X		X	
34.5 Purchasing advises Using Departments of steps to be taken.	7	11	0			X	X	X		
34.51 Hold materials for further instructions.	15	8	0			X	X	X		
34.8 Carrier provides receipt for pickup of materials.	10	8	0			X	X	X		

Department Head -
SUPPLEMENTARY TASK LIST 4

	Percentages Performing Task					Modal Frequency of Performance			Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a Year	Routine procedure	Minor Decisions	Select suitable procedure
X.-A Fill storeroom stock requisition.										
36. Storeroom receives stock requisition.	15	11	17	X	X			X		
36.1 Check requisition.	17	19	0	X	X				X	
36.11 For validity.	15	14	0	X	X				X	
36.12 For proper authorization.	12	11	0	X	X			X		
36.2 Fill approved requisition with items from stock.	19	14	17	X	X			X		
36.3 Indicate on requisition quantities of stock dispensed.	15	14	17	X	X			X		
36.4 Deliver materials to requesting department as shown on stock requisition.	15	11	17	X	X			X		
36.41 Obtain signature of authorized person to whom materials were delivered on stock requisition.	10	11	0			X	X		X	
36.5 Forward stock requisition to inventory control.	7	11	17	X	X			X		
X.-B Service storeroom replacement carts.										
37. Storeroom services exchange carts.										
37.1 Determine what Using Department has taken from replacement cart.	10	14	0	X	X			X		
37.2 Prepare requisition to charge department for what has been used.	10	14	17	X	X			X		
37.3 Restock cart to quota capacity.	10	14	0	X	X			X		
37.4 Route requisition to inventory control.	5	11	0		X				X	
XI.-A Process storeroom stock receiving reports.										
38. Inventory control receives receiving report(s).	12	14	33	X	X			X		
39. Process storeroom stock receiving reports.	10	14	33	X	X				X	
39.1 Enter receiving information into inventory control system.	10	14	33	X	X			X		
39.2 Bring balance on hand up to date.	12	16	33	X	X			X		

Department Head -
SUPPLEMENTARY TASK LIST 4

	Percentages Performing Task			Modal Frequency of Performance			Difficulty Level		
	Department Head	Supervisor	Worker	Daily	Several times a week	Several times a month	Several times a year	Routine procedure	Minor Decisions	Select suitable procedure
39.3 Forward receiving report to purchasing.	2	11	0		X			X		
XI.-B Process storeroom stock requisitions.										
40. Receive issued stock requisitions.	5	11	17		X			X		
40.1 Enter stock issue information into inventory control system.	12	8	17		X			X		
40.2 Enter price information to stock requisition as required by the system.	10	8	0		X	X		X		
40.3 Bring balance up to date.	7	11	17		X	X			X	
40.4 Forward stock requisition (charging information) to accounting department for expensing.	12	11	0			X	X		X	

APPENDIX G

LIST OF HEALTH CARE FACILITIES SELECTED FOR NATIONAL SURVEY

BIRMINGHAM

200 Beds or More	*Baroness Erlanger Hospital	Chattanooga, Tennessee
	*Baptist Medical Center	Birmingham, Alabama
100-199 Beds	*Jeff Anderson Memorial Hosp.	Meridian, Mississippi
	*St. Judes Catholic Hospital	Montgomery, Alabama
Under 100 Beds	Sam Howell Memorial Hospital	Cartersville, Georgia
	*Athens-Limestone Hospital	Athens, Alabama
Extended Care Fac.	*Plantation Manor	McCalla, Alabama
	St. Lukes Nursing Home	Birmingham, Alabama

BOSTON

200 Beds or more	Peter Bent Brigham Hospital	Boston, Massachusetts
	Memorial Hospital	Worcester, Massachusetts
100-199 Beds	Faulkner Hospital	Boston, Massachusetts
	*Thayer Hospital	Waterville, Maine
Under 100 Beds	Mary Lane Hospital	Ware, Massachusetts
	Falmouth Hospital	Falmouth, Massachusetts
Extended Care Fac.	Hebrew Rehab. Center for Aged	Boston, Massachusetts
	Cambridge Nursing Home	Cambridge, Massachusetts

CHICAGO

200 Beds or more	Chicago Wesley Memorial Hosp.	Chicago, Illinois
	*Memorial Hospital	Kenosha, Wisconsin
100-199 Beds	*Delnor Hospital	St. Charles, Illinois
	Beloit Memorial Hospital	Beloit, Wisconsin
Under 100 Beds	*DeKalb Public Hospital	DeKalb, Illinois
	Bethany Brethren Hospital	Chicago, Illinois
Extended Care Fac.	Hearthside Nursing Home	Chicago, Illinois
	Fox River Rehab. Center	Chicago, Illinois

*Purchasing survey responses received from one or more employees.

DENVER

200 Beds or more	*St. Marys Hospital	Grand Junction, Colorado
	*St. Lukes Hospital	Denver, Colorado
100-199 Beds	Memorial Hospital of Laramie County	Cheyenne, Wyoming
	*Poudre Valley Memorial Hosp.	Fort Collins, Colorado
Under 100 Beds	*Alamosa County Hospital	Alamosa, Colorado
	Longmont Community Hospital	Longmont, Colorado
Extended Care Fac.	Ivy Manor Nursing Home	Denver, Colorado
	Eventide Nursing Home	Longmont, Colorado

LOS ANGELES

200 Beds or more	*Kaiser Foundation Hospital	Panorama City, California
	*Santa Monica Hospital	Santa Monica, California
100-199 Beds	*Morningside Hospital	Los Angeles, California
	*West Valley Community Hosp.	Encino, California
Under 100 Beds	*Community Hospital of Gardena	Gardena, California
	*Garden Park General Hospital	Anaheim, California
Extended Care Fac.	Kaiser Extended Care Fac.	Panorama City, California
	*Culver City Convalescent Hosp.	Los Angeles, California

SEATTLE

200 Beds or more	*St. Francis Xavier Cabrini Hospital	Seattle, Washington
	*Emmanuel Hospital	Portland, Oregon
100-199 Beds	*St. Josephs Hospital	Aberdeen, Washington
	*Vancouver Memorial Hospital	Vancouver, Washington
Under 100 Beds	*Tri-State Memorial Hospital	Clarkston, Washington
	*West Seattle General Hosp.	Seattle, Washington
Extended Care Fac.	*Mt. Baker Convalescent Home	Seattle, Washington
	*L. C. Foss Sunset House	Seattle, Washington

*Purchasing survey responses received from one or more employees.

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